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Meeting Notes 2005-07-14 [Part B]

Joint Policy Advisory Committee on Transportation

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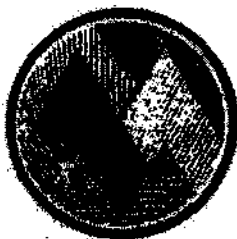
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Evaluation of Potential Measures for Achieving Modal Targets

Final Report*



METRO

PEOPLE PLACES

OPEN SPACES

July, 2005

***EXECUTIVE SUMMARY ONLY**

Full report available online at: <http://www.metro-region.org/article.cfm?articleid=12581>

Copies of the full report will also be provided at the 7/14/05 JPACT meeting

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The contents of this document do not necessarily reflect views or policies of the State of Oregon.

Table of Contents

Executive Summary.....	2
Background and Methodology.....	2
Organization of the Report	3
Overall Findings and Conclusions.....	3
Summary Recommendations.....	11
Chapter 1. Objectives and Methodology.....	17
Project Objectives.....	17
Methodology.....	20
Chapter 2. Existing Requirements and Current Efforts	22
Metro and Other Requirements to Reduce SOV Trips	22
Metro Implementation Monitoring.....	25
Summary of Findings for Local Jurisdiction Efforts	26
Conclusions.....	28
Chapter 3. Strategies and Tools for Future Implementation.....	30
Strategies Researched.....	30
Research and Project Process.....	33
Summary of Key Findings, Observations and Conclusions	34
Recommended Regional Requirements and Implementation.....	38
Section 1. Existing Minimum Regional Requirements	38
Section 2. Additional Minimum Regional Requirements	42
Section 3. Other Possible Strategies to Achieve Modal Targets	51
Section 4. Additional recommendations for implementation, measurement and monitoring	67
Section 5. Possible RTP amendments needed to implement project recommendations	68
Chapter 4. Next Steps.....	70
Appendix A. Detailed Report of Jurisdictional Compliance.....	71
Appendix B. Bibliography.....	91
Appendix C. Pedestrian and Bicycle Count Methodology	98
Appendix D. Transportation Policy Advisory Committee (TPAC) Workshop Summaries	103
Appendix E. Detailed Review of Strategies.....	110

Executive Summary

Background and Methodology

Metro's Regional Transportation Plan (RTP) is the blueprint that guides investment in the Portland metropolitan region's transportation system for all forms of travel – motor vehicle, transit, bike, pedestrian and freight. The 20-year plan, last updated in 2004, includes 2040 modal targets and specific actions to reduce the number of drive-alone trips as part of the region's strategy to support the 2040 Growth Concept, provide travel options, reduce vehicle emissions, decrease congestion and increase capacity for freight movement. A basic construct of the 2040 Growth Concept is to reduce the region's reliance on the automobile by focusing growth in centers and along major transportation corridors. It relies on a balanced transportation system that accommodates walking, bicycling, driving, transit and national and international goods movement. The RTP includes policies and projects to expand travel choices throughout the region, and encourage transit, walking, bicycling and carpooling.

The RTP identifies 2040 Non-Single Occupancy Vehicle (Non-SOV) Targets in place of and consistent with the Oregon Transportation Planning Rule (TPR) requirement to reduce vehicle miles of travel (VMT) per capita. The mode share targets are intended to be goals for cities and counties to work toward as they implement the 2040 Growth Concept and RTP at the local level. As required by the RTP and the TPR, jurisdictions within the Metro region must adopt policies and actions that encourage a shift towards non-SOV modes (Section 6.47 of the RTP). The TPR also requires Metro and other Metropolitan Planning Organizations to evaluate the effectiveness of these measures.

The ultimate goal of this project is to help Metro set realistic and defensible procedures and strategies for implementation by local jurisdictions in complying with RTP targets to reduce drive-alone trips in the region. With this goal as their focus, Metro staff, with the assistance of a consulting team led by Cogan Owens Cogan and Alta Planning + Design, undertook the following three major activities:

- Summarized existing Metro non-SOV mode share targets and related requirements, current efforts of a sample of local jurisdictions to meet these requirements, and ways in which these efforts are being measured and evaluated.
- Conducted and summarized the results of a comprehensive literature review of the effectiveness of strategies employed by various entities that are required or recommended by Metro to meet non-SOV mode share targets.
- Identified recommendations for future RTP requirements including minimum and supplemental requirements to meet modal targets, as well as best practices for implementation, procedures to measure effectiveness and processes to monitor compliance.

During each of these steps, a Project Oversight Committee and members of Metro's Transportation Policy Advisory Committee (TPAC) reviewed and commented on draft work products and provided guidance for subsequent tasks. The methodology for these tasks is described in more detail in subsequent sections of this report.

Organization of the Report

The remainder of this report is organized as follows:

- **Chapter 1 – Introduction.** This chapter provides a more detailed description of project objectives and methodology.
- **Chapter 2 – Existing Requirements.** This chapter summarizes existing Metro requirements for meeting modal targets, use of the Metro travel model to measure projected impacts on mode share, and methods by which selected jurisdictions in the region are helping meet the targets.
- **Chapter 3 – Strategies and Tools for Implementation.** This chapter describes strategies recommended to meet modal targets, including:
 - How they work
 - Their relative effectiveness in shifting mode share
 - Best practices for implementation
 - Procedures for measuring success and monitoring implementation

This chapter also identifies additional recommendations to help achieve modal targets and test effectiveness of specific strategies, as well as specific potential changes to the RTP.



- **Chapter 4 – Next Steps.** This chapter identifies how Metro expects to use the results of this report in the process of updating and implementing the RTP.
- **Appendices.** These provide more detailed information about Metro requirements, local implementation, research results, and summaries of advisory group meetings conducted during this project.

Summary of Findings and Conclusions

Following is summary of findings and conclusions that resulted from this project. They are described in more detail in Chapters 2 and 3.

Current Efforts to Achieve Modal Targets and to Measure Progress Toward Targets

Currently, the RTP requires local jurisdictions to implement the following strategies to help achieve modal targets:

1. Adopt 2040 modal targets in local Transportation System Plan (TSP) policies
2. Adopt street connectivity plans and implementing ordinances
3. Adopt maximum parking ratios to implement the parking requirements of Title 2 of the Urban Growth Management Functional Plan
4. Form and support transportation management associations (TMAs) where appropriate
5. Adopt fareless area transit policies in regional centers

6. Adopt transit strategies, including planning for adequate transit facilities and service; pedestrian facility planning and infrastructure that support transit use; location and design of buildings in transit zones that encourage transit use; and adoption of a transit system map, consistent with Metro requirements.

In addition to the six approaches listed above, the RTP identifies a variety of other tools related to land use, transit, bicycling, walking, parking, and employer-based strategies that may be considered or implemented by local jurisdictions. These are described in more detail in Chapters 2 and 3 of this report. In addition to Metro's requirements, the Oregon Department of Environmental Quality (DEQ) requires local companies and agencies having more than 50 employees to implement Employee Commute Options (ECO) programs to reduce drive-alone commute trips. While many of the jurisdictions provide some technical support to help companies comply with the ECO rule, TMA's and TriMet provide most of the support for employers' trip reduction programs through Metro's Regional Travel Options (RTO) Program. Partner agencies include Metro, TriMet, SMART, C-TRAN, Oregon DEQ, ODOT, Oregon Office of Energy, Port of Portland, the cities of Portland and Gresham, and Clackamas, Multnomah and Washington counties.

Metro evaluates local progress toward achieving the non-SOV modal targets through periodic updates to the RTP. Metro also reviews local TSPs of the 25 cities and three counties within the region using a checklist to ensure that RTP requirements are being met as they pertain to preparation of TSPs.

Metro estimates the impact of strategies primarily through its regional travel model. Appendix 1.8 of the RTP: "Transportation Analysis Zone Assumptions for Parking Transit and Connectivity Factors," identifies specific modeling assumptions by transportation analysis zone that are intended to mirror the expected improvements and programs proposed in the RTP and their impact on mode choice. The model provides relatively accurate and measurable mode share results from connectivity, transit and parking strategies that are incorporated into the model. It is less accurate in assessing the effect of pedestrian, bicycle, and ride-sharing strategies.

A survey of a sample of local jurisdictions in the region shows that most are making substantial progress in implementing existing Metro requirements. Table 1 summarizes results of this survey.

Table 1. Summary of Major Transportation Demand Management (TDM) Measures by Jurisdiction

TDM Measure	Portland	Beaverton	Gresham	Wilsonville	Oregon City	Clackamas County
Modal Targets (RTP)	●	●	●	●	●	●
Parking Management and Requirements (RTP)	●	●	●	●	●	●
Support of TMAs (RTP)	●	●	●	⊙	○	●
Roadway Connectivity Requirements (RTP)	●	●	●	●	⊙	●
Transit Pass Program in Regional Centers (RTP)	●	●	○	●	○	⊙
Other Transit Strategies	●	●	●	●	●	●
Neighborhood-based Travel Management	●	○	○	⊙	○	○
Development Incentives	●	●	●	●	○	○
Implementing Bicycle/Pedestrian Facilities	●	●	●	●	●	●
Carpool/ Match	●	○	●	⊙	○	●
Other	Carshare support	○	○	Shuttles	○	⊙

Sources of Data: City of Wilsonville TSP, Clackamas County TSP, Clackamas County Zoning Ordinance 1007.07, Clackamas County Comprehensive Plan, City of Gresham TSP, City of Portland TSP, City of Portland Comprehensive Plan, City of Beaverton TSP, City of Oregon City TSP, and telephone interviews with staff of respective jurisdictions.

Legend:

- Not in TSP or Codes
- ⊙ In TSP
- In TSP or Codes and currently implementing

Although local jurisdictions are making progress in meeting Metro requirements for implementation, relatively little has been done to evaluate the effectiveness of specific strategies at the local level, in part because local evaluation is not required and can be costly and difficult, given limited local resources. Of the six jurisdictions surveyed, only the City of Portland is actively measuring the causal effects of a specific TDM initiative, using its TravelSmart™ program. The City of Portland also has been tracking bicycle use over time in the central city and other areas, and analyzing the correlation between bikeway facilities and bicycle demand, safety, and other factors. In addition, TMAs and employers have been measuring progress towards mode shift targets through employee questionnaires as part of ECO-rule requirements.

During the past 10 years, the RTO program has focused on working with ECO employers to reduce drive-alone commute trips. The program evaluates itself annually to better understand and respond to changes in individual travel behavior. Included in the data are survey reports from each employment site subject to ECO rules, plus sites surveyed voluntarily (those with 50 or fewer employees). The program surveys employees about their travel behaviors to provide employers with appropriate strategies for increasing non-SOV use. Initial surveys also help identify baseline measures of mode share to be monitored over time. Additional annual surveys gauge the effects of

programs and improvements and monitor progress towards the mode-shift goal for a particular employment site. The annual reports also identify other strategies that, if implemented, may help reduce drive-alone trips. Current data shows non-drive-alone trips to and from work increased from 26 percent in 1996 to 31 percent in 2003.¹

More recent travel behavior research indicates that most trips are not work related. The RTO program and subcommittee are taking a new direction to better address non-work-related trips through a newly envisioned collaborative marketing program. New survey tools will be developed that measure the impact of the RTO program marketing efforts on increased use of non-auto modes of transportation. New evaluation techniques identified through this project and future RTO program efforts also may help the region better measure progress toward achieving the RTP's regional non-SOV modal targets.

Research on Effects of Strategies

For this project, the project team conducted a comprehensive literature review of studies that have assessed the effectiveness of a variety of transportation demand management (TDM) measures. For the purpose of this study, TDM measures include all strategies that are being implemented to reduce SOV use and/or encourage non-SOV use. These include measures currently required of local jurisdictions in the Metro region or identified as other possible strategies for consideration, such as transit, bike, and pedestrian infrastructure improvements, land use strategies, pricing and encouragement programs. A primary goal of this research was to identify existing research results that show direct and measurable correlations between implementation of specific strategies and effects on mode share. As noted below, this goal proved to be somewhat elusive. However, the research still yielded useful results. Summary observations include:

- It is very difficult to quantify the direct effect of any individual strategy on mode share; few studies have isolated and attributed changes in mode share to specific tools. Availability of quantitative measures of effectiveness varied significantly by strategy.
- Although a limited number of studies document quantitative relationships of cause and effect, a significant amount of research shows that the strategies required or recommended by Metro to reduce SOV mode share are effective in varying degrees.
- Individual strategies are generally more effective when used in combination with a variety of strategies.
- Different strategies have various levels of effectiveness in different parts of the region. Factors such as density of development (both residential and employment density), access to transit, level of connectivity, proximity to major employment centers, and other conditions affect potential effectiveness.
- The effectiveness of strategies, particularly in newly developed or developing areas, needs to be measured over a long period of time. Continued monitoring and measurement, including through use of Metro's regional travel model, is essential to gauge long-term effectiveness.
- The most effective strategies included parking pricing, transportation-efficient development and area-wide application of peak-period or mileage-based pricing strategies. A variety of other strategies also have documented impacts on mode share.

¹ 2003 Regional Travel Options Program Evaluation Report, page 6.

- Data collection is critical to monitoring the effectiveness of strategies (and measuring their success).

Table 2 summarizes the results of our research, as well as potential applicability in the Portland region and ease of implementation by local jurisdictions or others. Assessments of applicability are relative in comparison to other potential strategies. More detailed information is found in Chapter 3 and Appendix E.

Table 2. Summary of Literature Review Research

Strategy	Regional Applicability									
	Quantitative Evidence (SOV)	U.S. Studies	Oregon Studies	Relative Ease of Implementation	Applicability (PDX Region)	Central City, Regional and Town Centers	Targeted Areas	Transit/Mixed-use Corridors	Other Urban Areas	Modal Share Impact
Land Use										
Connectivity	○	●	●	◐	●	✓	✓	✓	✓	1% - 2% VMT
Transportation-Efficient Development	●	●	●	◐	●	✓		✓		15% - 24% SOV ¹²
Parking										
Parking Pricing	●	●	●	●	●	✓	✓	✓	✓	2.5% - 5% SOV ¹² 20% SOV ¹ 5% - 35% SOV ¹
Parking Supply and Management	●	●	●	◐	◐	✓		✓		28% RDI ¹ ; 40% - 50% PKD
Timed Parking	●	●	○	●	●		✓			
Fare Free Area										
Fareless Area	●	●	●	◐	◐	✓				2% - 3% SOV
Transit										
Bus Service Improvements	◐	●	●	●	●	✓	✓	✓	✓	4% - 30% RDI
Demand Responsive / ADA Service	○	●	○	◐	●	✓	✓	✓	✓	40% wheelchair RDI
High Capacity Transit Service	◐	●	◐	◐	●	✓		✓		20% - 72% of new riders shifted mode from auto; 92% RDI over previous bus route
HOV Lane	◐	●	○	◐	◐			✓		Reduce vehicle trips 4% - 30%
Park-and-Ride/ Carpool Lots	●	●	●	◐	●				✓	40% - 60% SOV ²
Pricing and Fares	●	○	●	◐	○					18% SOV; 12% - 59% mode shift from auto
Site Design / Accessibility	●	●	○	◐	●	✓	✓	✓	✓	2% to 4.75% SOV ¹²
Transportation Management and Employer-Based Strategies										
Alternate Work Schedule and Telecommute	◐	●	○	●	●	✓	✓	✓	✓	Auto commute reduced 7% - 10% ⁹
Carshare	◐	●	●	◐	●	✓				47% VMT ¹⁰
Guaranteed Ride Home	○	●	○	◐	●				✓	N/A

Strategy	Regional Applicability									Modal Share Impact
	Quantitative Evidence (SOV)	U.S. Studies	Oregon Studies	Relative Ease of Implementation	Applicability (PDX Region)	Central City, Regional and Town Centers	Targeted Areas	Transit/Mixed-use Corridors	Other Urban Areas	
Rideshare	○	●	○	◐	●	✓	✓	✓	✓	Represents 2% - 7% of commute trips
Shuttle Service	--	--	--	--	--				✓	N/A
Marketing and Promotion	◐	●	●	●	●	✓	✓	✓	✓	21% RDI
Bicycle and Pedestrian										
Bikeway Improvements	◐	○	●	●	●	✓	✓	✓	✓	1 - 4% SOV; 100 - 150% Bike RDI ¹³
Elimination of Auto Access	--	--	--	--	--	✓				N/A
Encouragement, Promotional and Individualized Marketing Programs	●	●	●	●	●	✓	✓	✓	✓	6% SOV; 12% VMT
End-of-Trip Facilities	●	●	●	◐	●	✓	✓	✓	✓	77% SOV ⁴
Free Bike and "Smart Bike" Programs	○	○	●	◐	◐		✓			N/A
Pedestrian Improvements ⁷	--	--	--	--	--	✓	✓	✓	✓	N/A
Safe Routes to School	●	●	○	●	●	✓	✓	✓	✓	13% SOV ¹¹
Traffic Calming	○	○	○	◐	◐	✓	✓	✓	✓	5% - 54% Ped/Bike RDI
Pricing										
Congestion Pricing	●	●	●	●	◐	✓	✓	✓	✓	15% - 30% transit RDI; 1% - 3% SOV; 28% - 30% transit shift ³
Vehicle Miles Traveled Tax	○	○	○	○	○	✓	✓	✓	✓	13% VMT ⁵
Vehicle Miles Traveled Insurance	○	●	○	◐	◐	--	--	--	--	13% VMT ⁶

Evidence of Mode Share Impact

-- = No evidence

● = Direct evidence of impact on SOV use or mode share

◐ = Anecdotal relationship, including quantitative evidence of change in VMT

○ = Indirect relationship based on anecdotal evidence

Examples and Data Availability

● = Yes

○ = No

Implementation and Applicability

● = High (easy to implement or very applicable)

◐ = Moderate

○ = Low (difficult to implement or relatively un-applicable)

Modal Share Impact

SOV = Single occupancy vehicle trips

VMT = Vehicle miles traveled

RDI = Ridership increase

PKD = Parking demand

Table 2: Notes

1. Applies to commuting trips only.
2. Applies only to percentage of people using park-and-ride lots who switched from SOV to carpool or transit use.
3. Some figures apply only to users of priced facilities.
4. Applies only to percentage of people using BikeCentral who switched from SOV to bicycle commute.
5. Extrapolated from modeling results.
6. Extrapolated from modeling results; applies only to mileage-based insurance policy-holders.
7. See connectivity for related effects, including quantitative measure of impacts.
8. Some studies used apply only to those surveyed who drove to work before they lived near transit.
9. Estimates based on modeling.
10. Applies only to participants in carsharing program.
11. Applies to participants in Safe Routes To School program.
12. Extrapolated from a study of this strategy's effects on SOV commute trips and assumes that commute trips make up 25% of all trips.
13. Studies reviewed for this effort indicate this range of impact. However, impacts can be even more significant over time. For example, bicycle ridership on some facilities in the Portland area has increased from about 200 to several thousand riders a day, an increase of several thousand percent.

Implications for Application in This Region

Many of the strategies researched for this project already are required by the RTP or the TPR and are being implemented to varying degrees in this region. They have been successful in increasing the share of bicycling, walking, transit and other non-SOV trips and include:

- Connectivity plans for new residential and mixed-use areas are required by local jurisdictions and implemented throughout the region.
- Fareless transit service areas have been implemented downtown extended to Lloyd District in Portland, and in Wilsonville. Fareless areas could be implemented in other regional centers in the future in coordination with transit service providers. Requirements related to this strategy are expected to be revisited as part of the RTP update.
- Transit-oriented design is required and implemented by local jurisdictions in specific areas. It is applicable throughout the region and most effective in denser residential, employment or mixed-use areas, including town and regional centers and transit corridors.



- Transportation-efficient development (i.e., higher density and mixed use development with access to frequent transit service and bike and pedestrian facilities and with opportunities for short pedestrian and bicycle trips to near by destinations) is applied through housing and employment targets for regional and town centers and corridors in the region. This strategy is most applicable in these denser areas of the region.
- Parking maximum ratios are required through Title 2 of Metro's functional plan and have been implemented by most jurisdictions in the region. They are implemented throughout each jurisdiction.
- Formation and support for TMAs currently is required for all jurisdictions in the region. To date, they have been implemented in Portland, Troutdale, Gresham, Clackamas and northwestern Washington County through the Westside Transportation Alliance. They are most

applicable and effective in major employment centers with good access to transit, bicycle and pedestrian facilities. Requirements related to this strategy are expected to be revisited as part of the RTP update.

Other strategies that could be required and/or implemented by local jurisdictions through requirements in the RTP have varying applicability throughout the region, including the following:

- More aggressive parking pricing and management policies are recommended for future consideration but are likely to be effective only in areas without free or unmanaged on or off-street parking alternatives.
- Though not required by the RTP, bicycle and pedestrian improvements are mandated by state and federal requirements for specific facilities and are being implemented by local jurisdictions throughout the region. They are applicable in all areas of a given jurisdiction but likely to be most effective along major travel routes and easiest to implement in newly developing areas or as part of major transportation system improvements. Pedestrian improvements in particular are likely to be most effective in areas with the potential for high pedestrian use and to provide access to transit facilities.
- A variety of other bicycle-oriented strategies (end of trip facilities, promotional programs, etc.) can be implemented throughout the region but will have the greatest impact in major employment areas, including downtown Portland and regional and town centers.
- Frequent, comprehensive transit service is being implemented and is applicable throughout the region. Higher frequency service and certain types of facilities (e.g., light rail transit) require a certain level of residential or employment density to be cost-effective and successful.
- Notwithstanding successful local examples in the City of Portland, TravelSmart™ programs are expected to be best applied at the regional level, because of the cost and staffing resources associated with this individualized marketing approach. Data collection is also a critical component of this program.
- Pricing strategies, including peak period pricing and mileage-based insurance or fees can be implemented primarily by regional or state governments or the private sector. Facility-based pricing may be implemented by Metro and ODOT, with the cooperation of local governments on major highway facilities. Area-wide pricing is unlikely to be implemented in the foreseeable future.

Summary Recommendations

Following are recommendations for strategies to achieve modal targets, as well as procedures to measure their success and local jurisdiction and Metro compliance in meeting requirements.

Suggested amendments to the RTP also are briefly summarized. These recommendations are described in more detail in Chapter 3.

Minimum and Other Requirements

The following existing minimum requirements are recommended for ongoing implementation and monitoring:

- Modal targets adopted in local TSPs

- Connectivity planning requirements
- Transit-oriented design requirements
- Maximum parking ratios

Two existing minimum requirements – formation of and support for TMAs and adoption of fareless areas – are recommended to be revisited and possibly eliminated as minimum requirements for all jurisdictions as part of the upcoming RTP update process. These two strategies would continue to be encouraged where feasible and where they are likely to be effective.

The following **additional minimum requirements** are recommended to be considered as part of a safe-harbor approach (i.e., acceptable, minimum set of strategies) for local jurisdictions during the next RTP update process.

- Continue to require **transportation-efficient development** through efforts to meet density and other land use targets in centers and corridors as part of compliance with Metro Functional Plan and related requirements. This type of development includes higher density and mixed use development with access to frequent transit service and bike and pedestrian facilities and with opportunities for short pedestrian and bicycle trips to near by destinations. Local jurisdictions and the region as a whole would be given credit for these efforts as part of the modal targets monitoring process.
- Construct **bicycle and pedestrian improvements** as required by state and federal regulations, and consistent with local TSPs and regional guidelines. Local governments and Metro should prioritize improvements that enhance connectivity of the bicycle and pedestrian system and access to transit.
- Continued provision of **frequent and comprehensive transit service** by TriMet and other transit agencies. Local jurisdictions and the region as a whole would be given credit for these efforts as part of the modal targets monitoring process.
- Support and encourage efforts to implement **employer-based TDM strategies**.
- Encourage of efforts to **eliminate employer-subsidized parking** and/or support for parking cash-out, preferred HOV-parking or other **parking pricing strategies**. This strategy ultimately would be implemented primarily by the private sector. However, local governments would be required to encourage such practices and consider them in parking management and design regulation efforts. Local governments also could be required or encouraged to consider use of these strategies for their own employees.
- Support and coordinate **Safe Routes to School programs** and projects. Local jurisdictions and Metro should support and help coordinate these efforts by seeking and procuring project funding from federal, state and local sources, and providing technical assistance.

A variety of additional strategies are recommended for consideration by local jurisdictions, advocacy groups and private employers, including the following:

STRATEGY	PRIMARY IMPLEMENTATION ENTITY	SUPPORTING IMPLEMENTATION ENTITY
<i>Parking</i>		
• Additional parking management and supply strategies	Local Jurisdictions	Private Sector, Metro
<i>Transit</i>		
• Bus service improvements	Transit Agencies, SMART, Metro	Local Jurisdictions
• High capacity transit (Light rail, streetcar and bus rapid transit)	Transit Agencies, Metro, Local jurisdictions	Local Jurisdictions
• Demand responsive / ADA service	TriMet, Metro	Employers
• Marketing and Promotion, including individualized marketing (e.g., TravelSmart™)	Transit Agencies	Local Jurisdictions, Employers
• Park-and-ride and carpool lots	Transit Agencies, ODOT	Local Jurisdictions
<i>Transportation Management and Employer-Based Strategies</i>		
• Alternate Work Schedule and Telecommute	Employers	TMA's, Metro
• Carshare	Employers	TMA's, Metro
• Guaranteed Ride Home	Employers	TMA's, Metro
• HOV Lane	ODOT	Metro, Local Jurisdictions
• Rideshare	Employers	TMA's, Metro
• Shuttle Service	Employers	TMA's, Metro
• Marketing and Promotion, including individualized marketing (e.g., TravelSmart™)	Metro, TMA's	Local Jurisdictions, Employers
<i>Bicycles and Pedestrians</i>		
• Encouragement, Promotional and Individualized Marketing Programs (e.g. TravelSmart™)	Metro Advocacy Groups	Local Jurisdictions, Employers,
• End-of-Trip Facilities	Employers, Local Jurisdictions	Metro, Transit Agencies
• Free Bike and "Smart Bike" Programs	Employers, Advocacy Groups	
• Traffic Calming	Local Jurisdictions	
<i>Pricing</i>		
• Peak period pricing – lane or facility-based pricing	Metro, ODOT	Local Jurisdictions
• Mileage-based insurance	Private Sector, State Legislature	Advocacy Groups
• Mileage-based fees	ODOT, Legislature	Advocacy Groups
• Gas tax increase	ODOT, Legislature	Advocacy Groups

Note: HOV lane is located in Transportation Management and Employer-Based strategies for lack of an appropriate category.

More detailed information about implementation of these strategies is included in Chapter 3.

Measuring Success

A primary recommendation of this study is for Metro to take the lead monitoring the region's progress in meeting modal targets both regionally and in specific portions of the region (e.g., centers and corridors). Processes for measuring success include the following:

- Continue to use the regional travel model to assess current and projected future progress in achieving modal targets. Assumptions about the impact of specific strategies should be refined based on the results of this study.
- Use the upcoming revised travel behavior survey as an opportunity to gather additional information about the potential effects of strategies to achieve modal targets. Use the results of the survey to further update the model. Possible additional survey questions are listed in Chapter 3, Section 4.



- Work with local jurisdictions to create and maintain a region-wide database of bicycle (and pedestrian) user counts, provide guidance on the methodologies, help organize or provide PSU students or interns to carry out these counts, and track the progress over time. The cost of data collection will be an important factor in devising a system to create and maintain this database.
- Compile, coordinate and help evaluate local surveys or data related to the potential effectiveness of specific strategies as described in Chapter 3 this report. Help identify and catalogue transportation-related survey efforts undertaken in the region by Metro, TriMet, local jurisdictions and others.
- Continue to evaluate the success of employer-based strategies through the RTO program and in cooperation with employers, TMAs and local jurisdictions.

In addition to Metro's efforts to evaluate success on a regional or sub-regional level, we recommend that local jurisdictions, TriMet and others conduct surveys to assess the effectiveness of specific strategies in increasing non-SOV mode share. Examples could include the following:

- Vehicle and non-vehicle ridership (transit, bicycle and pedestrian) counts in areas where bicycle, pedestrian or transit improvements are implemented, both before and after completion.
- Surveys of residents or employees in areas served by improved facilities to assess impacts on travel behavior. Local jurisdictions and others should seek opportunities to use grant funding, interns and other low-cost techniques to gather and evaluate this information.
- Evaluation of data currently being collected (e.g., park-and-ride lot origin-destination data and ridership surveys) to assess the effectiveness of given strategies on mode share or VMT, where feasible.

These recommendations are discussed in more detail in relationship to individual strategies in Chapter 3.

Monitoring Compliance

A variety of procedures are recommended to monitor compliance with existing and new Metro requirements, including the following:

- Continue to review local TSPs using a refined checklist to ensure compliance with requirements for updating those plans.
- Continue to review comprehensive plans and development codes for compliance with Functional Plan requirements, including density and other land use and development targets for regional centers and corridors.
- Use the bicycle and pedestrian database described in the previous section to monitor progress in planning for and constructing bicycle and pedestrian improvements, and require each local jurisdiction to produce and regularly update bike/ped progress report outlining the effects to intersection nodes.
- Review annual reports prepared by the RTO program and DEQ related to ECO-rule compliance to assess progress in meeting those program goals; incorporate applicable results of these reports in RTP updates.
- Identify and track indicators related to transit system improvements, safe routes to school projects, elimination of employer subsidized parking, bicycle/pedestrian improvements and other strategies.
- Review and report on efforts by local jurisdictions and others to track progress in implementing optional strategies to meet modal targets, including before and after surveys, bicycle, pedestrian and other traffic counts, park-and-ride usage and related mode split data, and others (see Chapter 3 for more detailed information).

Updating the RTP

The following types of Plan amendments are recommended for consideration in the upcoming RTP update process.

- Amend Chapter 1 to add or refine policies related to suggested new minimum RTP requirements.
- Revise descriptions of transportation elements in Chapter 1 to incorporate information in this report related to park-and-ride lots, bicycle and pedestrian system, traffic calming, transportation management and parking.
- Update modal requirements sections of Chapter 6 to incorporate the following recommendations of this report:
 - Suggested changes to existing requirements for TMAs and Fareless Areas (pending a discussion of these elements during the RTP update process).
 - Potential new minimum mode share target requirements.
 - Expanded and reorganized description of secondary, optional strategies.
 - New procedures for measuring impacts of required strategies on mode share.
 - Proposed procedures for monitoring compliance with existing and new minimum strategies.

- Summary information from Appendices 1.8 and 2.2 related to the relationship between modal targets and RTP modeling assumptions and which types of assumptions are included in the model.

These amendments are described in more detail in Chapter 3.

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Next Steps

Results of this project will inform the upcoming update of the RTP, as well as related efforts to update the region's Travel Behavior Survey and regional travel model. Next steps for Metro and local jurisdictions include the following:

- Present findings and recommendations to the RTO Subcommittee, TPAC, JPACT and the Metro Council for consideration and refinement.
- Prepare a newsletter summarizing the results of this study and next steps for implementation.
- Post newsletter and final report on Metro's Web site.
- Incorporate recommendations in updating the Travel Behavior Survey questionnaire and subsequent analysis.
- Consider suggestions for updating the regional travel model.
- Consider recommendations for amending the RTP as part of the upcoming update process.
- Implement recommendations for measuring the impact of strategies to affect mode share as described in this report and per results of the RTP update process.
- Incorporate suggestions for new procedures to monitor RTP compliance per results of the RTP update process.
- Work with local jurisdictions to encourage employers, state officials and others to pursue selected strategies, as described in this report.
- Consider results of this project in RTO program and TMA efforts to encourage use of alternative modes and transportation demand management techniques.
- Prepare additional fact sheets, as needed, detailing the results of this study and recommendations for implementation. Distribute to local governments, transit agencies, employee commute coordinators, state officials, TMAs and others.



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implemented through continued efforts to meet density and other land use targets in centers and transportation corridors as part of compliance with Metro Functional Plan and related requirements. This type of development includes higher density mix of housing and employment uses that are served by transit and bicycle and pedestrian facilities. Local jurisdictions and the region as a whole would be given credit for these efforts as part of the modal targets monitoring process. These strategies are most applicable in these denser areas of the region.

- Construction of **bicycle and pedestrian improvements** as required by state and federal regulations and consistent with local TSPs and regional guidelines. Local governments and Metro should prioritize improvements that enhance connectivity of the bicycle and pedestrian system and access to transit. This strategy is applicable in all areas of the region but most effective in areas with high rates of bicycle and pedestrian use and where targeted improvements to specific facilities can have large impacts on those modes of travel.
- Continued provision of **frequent and comprehensive transit service** by TriMet and other transit agencies. Local jurisdictions and the region as a whole would be given credit for these efforts as part of the modal targets monitoring process.
- Support for and encouragement of efforts to implement **employer-based TDM strategies**. This strategy is applicable in employment areas throughout the region, and likely to be most effective in areas with access to good bicycle, pedestrian and transit facilities and services.
- Support for and coordination of **Safe Routes to School programs** and projects. Local jurisdictions and Metro should support and help coordinate these efforts through project funding and technical assistance. This strategy is applicable throughout the region.
- Encouragement of efforts to **eliminate employer-subsidized parking** and/or support for parking cash-out, preferred HOV-parking or other **parking pricing strategies**. This strategy ultimately would be implemented primarily by the private sector and should be considered as part of a comprehensive parking strategy where market and other conditions allow for feasible and effective implementation. These requirements likely would not be applicable in all jurisdictions but could be required in selected jurisdictions or sub-areas within the region. In addition, Metro should consider the following actions as part of the next RTP update:
 - ✓ Possibly require public agencies above a certain size to eliminate parking subsidies and/or provide cash-out alternatives for their employees.
 - ✓ Possibly require public and private parking facilities to reserve spaces or reduce fees for HOVs through municipal codes and Metro guidelines.
 - ✓ Prepare informational materials promoting this strategy and targeted to employers in areas where this strategy is expected to be most effective; work with local jurisdictions, TMAs and others to disseminate these materials.
 - ✓ Incorporate this strategy in marketing efforts expected to be undertaken by the RTO program as part of its regional marketing program to promote use of alternative travel modes.



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Recommended Minimum RTP Requirements

Existing Minimum Requirements

The following existing requirements are recommended for ongoing implementation and monitoring:

- **Modal targets adopted in local Transportation System Plans (TSPs).**
- **Connectivity planning requirements.** Connectivity plans for new residential and mixed-use areas are required by local jurisdictions and implemented throughout the region.
- **Transit-oriented design requirements.** These are required and implemented by local jurisdictions in specific areas. They are applicable throughout the region but most effective in denser residential, employment or mixed-use areas, including town and regional centers and transit/mixed-use corridors.
- **Maximum parking ratios.** Parking maximum ratios are required through Title 2 of Metro's functional plan and have been implemented by most jurisdictions in the region. They are implemented throughout each jurisdiction.

The following two existing minimum requirements are recommended to be revisited and possibly eliminated as minimum requirements for all jurisdictions as part of the upcoming RTP update process. These two strategies would continue to be encouraged where feasible and likely to be effective.

- ***Formation of and support for Transportation Management Associations (TMAs).*** Formation and support for TMAs currently is required for all jurisdictions in the region. To date, they have been implemented in Portland, Troutdale, Gresham, Clackamas and northwestern Washington County through the Westside Transportation Alliance. They are most applicable and effective in major employment centers with good access to transit, bicycle and pedestrian facilities.
- ***Adoption of fareless areas.*** Fareless areas have been implemented downtown and extended to the Lloyd District in Portland, and in the City of Wilsonville. Fareless areas could be implemented in other regional centers in the future in coordination with transit service providers.

Recommended Additional Minimum Requirements

The following additional minimum requirements are recommended to be considered during the next RTP update process as part of a safe-harbor approach (i.e., acceptable, minimum set of strategies) for local jurisdictions.

- Continue to require **transportation-efficient development**, i.e., higher density and mixed use development with access to frequent transit service and bike and pedestrian facilities and with opportunities for short pedestrian and bicycle trips to near by destinations. This would be

2040 Modal Targets Project

Summary Observations and Conclusions of Research

- It is very difficult to quantify the direct effect of any individual strategy on mode share; few studies have isolated and attributed changes in mode share to specific tools. Availability of quantitative measures of effectiveness varies significantly by strategy.
- Although a limited number of studies document quantitative relationships of cause and effect, a significant amount of research shows that many of the strategies required or recommended by Metro would be expected to reduce SOV mode share are effective.
- Individual strategies will be more effective when used in combination with a variety of strategies.
- Different strategies are expected to be more or less effective in different parts of the region. Factors such as density of development (both residential and employment density), access to transit, level of connectivity, proximity to major employment centers, and other conditions will affect potential effectiveness.
- The effectiveness of many strategies, particularly in newly developed or developing areas, will need to be measured over a long period of time. Continued monitoring and measurement, including through use of Metro's regional travel model, is essential to gauge long-term effectiveness.
- The most effective strategies included parking pricing, location-efficient development and area-wide peak-period or mileage-based pricing strategies. A variety of other strategies also have documented impacts on mode share.
- Data collection is critical to monitoring the effectiveness of strategies (and measuring their success).

2040 Modal Targets Project

Additional Optional Strategies

A variety of additional strategies are recommended for consideration by local jurisdictions, advocacy groups and private employers on a **voluntary** basis, including the following:

STRATEGY	PRIMARY IMPLEMENTATION ENTITY	SUPPORTING IMPLEMENTATION ENTITY
<i>Parking</i>		
• Additional parking management and supply strategies	Local jurisdictions	Private sector, Metro
<i>Transit</i>		
• Bus service improvements	Transit agencies	Local jurisdictions
• High capacity transit (Light rail, streetcar and bus rapid transit)	TriMet, Metro, Local jurisdictions	Local jurisdictions
• Demand responsive / ADA service	Transit agencies, Metro	Employers
• Marketing and promotion, including individualized marketing (e.g., Travel Smart)	Transit agencies	Local Jurisdictions, Employers
• Park-and-ride and carpool lots	TriMet, ODOT	Local jurisdictions
<i>Transportation Management and Employer based strategies</i>		
• Alternate Work Schedule and Telecommute	Employers	TMA's, Metro
• Carshare	Employers	TMA's, Metro
• Guaranteed Ride Home	Employers	TMA's, Metro
• Rideshare	Employers	TMA's, Metro
• Shuttle Service	Employers	TMA's, Metro
• Marketing and promotion, including individualized marketing (e.g., Travel Smart)	Metro, TMA's	Local Jurisdictions, Employers
• HOV Lane (<i>not strictly a TDM strategy but does not fit with any other category in this table</i>)	ODOT	Metro, Local jurisdictions
<i>Bicycles and Pedestrians</i>		
• Encouragement, Promotional and Individualized Marketing Programs	Metro, Employers, Advocacy groups	Local Jurisdictions
• End-of-Trip Facilities	Employers, Local jurisdictions	Metro, Transit providers
• Free Bike and "Smart Bike" Programs	Employers or Advocacy groups	
• Traffic Calming	Local Jurisdictions	



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STRATEGY	PRIMARY IMPLEMENTATION ENTITY	SUPPORTING IMPLEMENTATION ENTITY
<i>Pricing</i>		
• Peak period pricing – explore lane or facility-based pricing per existing Metro policies	Metro, ODOT	Local Jurisdictions
• Mileage-based insurance	Private sector, state legislature	Advocacy groups
• Mileage-based fees	ODOT, legislature	Advocacy groups
• Gas tax increase	ODOT, legislature	Advocacy groups

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Measuring Success

A primary recommendation of this study is that Metro take the lead in assessing the region's progress in meeting modal targets both for the region as a whole and in specific areas (e.g., centers and corridors). Processes for measuring success include the following:

- Continue to use the regional travel model to assess current and projected future progress in achieving modal targets. Assumptions about the impact of specific strategies should be refined based on the results of this study.
- Use the upcoming revised travel behavior survey as an opportunity to gather additional information about the potential effects of strategies to achieve modal targets. Use the results of the survey to further update the model.
- Work with local jurisdictions to create and maintain a region-wide database of bicycle (and pedestrian) user counts, provide guidance on the methodologies, help organize or provide PSU students or interns to carry out these counts, and track the progress over time.
- Compile, coordinate and help evaluate local surveys or data related to the potential effectiveness of specific strategies. Help identify and catalogue transportation-related survey efforts undertaken in the region by Metro, TriMet, local jurisdictions and others.
- Continue to evaluate the success of employer-based strategies through the RTO program and in cooperation with employers, TMAs and local jurisdictions.

In addition to Metro's efforts to evaluate success on a regional or sub-regional level, we recommend that local jurisdictions, TriMet and others conduct surveys to assess the effectiveness of specific strategies in increasing non-SOV mode share. Examples could include the following:

- Vehicle and non-vehicle ridership (transit, bicycle and pedestrian) counts in areas where bicycle, pedestrian or transit improvements are implemented, both before and after completion.
- Surveys of residents or employees in areas served by improved facilities to assess impacts on travel behavior. Local jurisdictions and others should seek opportunities to use grant funding, interns and other low-cost techniques to gather and evaluate this information.
- Evaluation of data currently being collected (e.g., park-and-ride lot origin-destination data and ridership surveys) to assess the effectiveness of given strategies on mode share or VMT, where feasible.



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Monitoring Compliance

A variety of procedures are recommended to monitor compliance with existing and new Metro requirements, including the following:

- Continue to review local TSPs using a refined checklist to ensure compliance with requirements for updating those plans.
- Continue to review comprehensive plans and development codes for compliance with Functional Plan requirements, including density and other land use and development targets for regional centers and corridors.
- Review annual reports prepared by the RTO program and DEQ related to ECO-rule compliance to assess progress in meeting those program goals; incorporate results in RTP updates.
- Identify and track indicators related to transit system improvements, safe routes to school projects, elimination of employer subsidized parking, bicycle/pedestrian improvements and other strategies.
- Review and report on efforts by local jurisdictions and others to track progress in implementing optional strategies to meet modal targets, including before and after surveys, bicycle, pedestrian and other traffic counts, park-and-ride usage and related VMT reduction data, and others.



2040 Modal Targets Project

Updating the Regional Transportation Plan

The following types of Plan amendments are recommended for consideration in the upcoming RTP update process.

- Amend Chapter 1 to add or refine policies related to suggested new minimum RTP requirements.
- Revise descriptions of transportation elements in Chapter 1 to incorporate information in this report related to park-and-ride lots, bicycle and pedestrian system, traffic calming, transportation management and parking.
- Update modal requirements sections of Chapter 6 to incorporate the following recommendations of this report:
 - Suggested changes to existing requirements for TMAs and Fareless Areas (pending a discussion of these elements during the RTP update process).
 - Potential new minimum requirements.
 - Expanded and reorganized description of secondary, optional strategies.
 - New procedures for measuring impacts of required strategies on mode share.
 - Proposed procedures for monitoring compliance with existing and new minimum strategies.
 - Summary information from Appendices 1.8 and 2.2 related to the relationship between modal targets and RTP modeling assumptions and which types of assumptions are included in the model.



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Project Objectives

- Evaluate potential actions that local governments may take to reduce SOV trips.
- Provide Metro and local jurisdictions with minimum requirements that will constitute a safe harbor for meeting RTP modal targets, as well as additional, optional measures to promote non-SOV trips.
- Provide local governments with guidelines for implementing SOV trip-reduction measures.
- Describe methods by which Metro will determine local government compliance with non-SOV target requirements.
- Ensure that recommended SOV trip-reduction measures are reasonably feasible for local government implementation considering staff and budget limitations.
- Ensure that input from local governments and Metro are considered in the development of recommendations.

Project Tasks

- Summarized existing Metro requirements and current efforts of a sample of local jurisdictions to meet non-SOV mode share targets and existing related requirements, and how the measures are being evaluated.
- Conducted and summarized the results of a comprehensive literature review of the effectiveness of strategies required or recommended by Metro to meet SOV mode share targets.
- Identified recommendations for future RTP requirements including minimum and supplemental requirements to meet modal targets, as well as best practices for implementation, procedures to measure effectiveness and processes to monitor compliance.
- Conducted three workshops with representatives of TPAC to review and refine results after each of the above steps.

M E M O R A N D U M

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METRO

DATE: July 7, 2005
TO: JPACT Members and Interested Parties
FROM: Andy Cotugno
SUBJECT: Transportation Planning Rule Handouts

The attached documents relating to the TPR agenda item were submitted to MTAC at their regular meeting on Wednesday July 6th and will be reviewed in depth by TPAC at a special workshop being held on Monday, July 11th. Updated handouts incorporating the changes made by each committee will be provided at the JPACT meeting on Thursday, July 14, 2005.

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METRO

DATE: June 17, 2005
TO: TPAC Members and Interested Parties
FROM: Tom Kloster, Transportation Planning Manager
SUBJECT: Recent Transportation Planning Rule Amendments

On March 15, the Oregon Land Conservation and Development Commission (LCDC) adopted broad revisions to OAR 660-012-0060, the state Transportation Planning Rule. This round of amendments was focused on critical issues raised by the recent Jaqua vs. City of Springfield case that threatened current planning practices for balancing transportation and land use plans. While the LCDC response to the Jaqua case began as "fine tuning" amendments to the TPR, sweeping new provisions were introduced shortly before the draft rule was released for public review on January 3, 2005. These provisions, and staff recommendations for remedying them, are discussed in this memorandum.

The "1/2 Mile Rule"

The amended TPR reaffirms the existing practice of evaluating land use and transportation plan amendments for their effects in the horizon year of adopted 20-year plans in response to the Jaqua decision. However, the amended rule also applies a special test for transportation system adequacy along certain interstate highway corridors that creates a bar so high that the practical effect will be a zoning freeze in many of the affected areas of the metropolitan region. Known as the "1/2 mile rule", this provision represents a major shift in policy that Metro believes unacceptable because of the effects on the region's ability to implement the 2040 Growth Concept in these corridors.

The 1/2 mile rule requires plan amendments within a half mile radius of interchanges on I-5, I-205, I-405 and I-84 to be evaluated according to the Regional Transportation Plan (RTP) "financially constrained" system, a set of improvements that represents just over one third of the needed projects in the region. Metro's analysis of the financially constrained system showed that most of the interstate system in the region would fail to meet the RTP level of service policy in the 2020 horizon year with this limited set of improvements. The net effect would be a cap on plan amendments in affected areas that where added housing or employment might be proposed.

This means that zoning to increase employment or housing densities could be blocked in

the Portland Central City, Gateway, Clackamas and Oregon City regional centers, Hollywood, Lents, West Linn, Tualatin and Wilsonville town centers and every station community along the Interstate, Airport and I-205 MAX lines. The inner portions of the Banfield MAX line are also affected. In many cases, local zoning that implements these 2040 designations hasn't been adopted yet, so the impact is dramatic along the Interstate and I-205 MAX corridors, in particular. In the Tualatin/Wilsonville area and Gresham's Springwater employment area, planned industry on land recently brought inside the urban growth boundary could be affected. In Metro's preliminary analysis, the rule affects more than 24,000 acres in these corridors, of which more than 8,000 areas fall into 2040 centers, station communities and main streets, alone.

Metro has opposed the "1/2 mile rule" over concerns that it is overly simplistic and has significant unintended effects that were not considered during rulemaking. Unfortunately, the State did not complete any sort of land use or transportation analysis when drafting these requirements. While Metro shares the state's interest in protecting the integrity of the interstate highway system, we also believe this goal can be much more effectively achieved through more thoughtful strategies that are coordinated with adopted land use and transportation plans.

There is also some dispute over whether the amendments apply to areas beyond the interchanges, due to confusion over how the amendments related to pre-existing terminology in the rule. This stems from an interpretation by State planning staff that the recent amendments changed the definition of "funding plan" as the term has been applied to system plans over the past 15 years. Under this interpretation, the provisions of the "1/2 mile rule" would be expanded to cover all state-owned facilities. Metro staff do not agree that this was the intention of the OTC and LCDC when the amendments, since it represents a sweeping expansion of the interchange policy that was not discussed by the joint commissions during rulemaking.

To address these issues, the accompanying amendments would establish a different process for those metropolitan areas where a regional system plan is already required by the TPR. A regional plan already provides a more comprehensive look at interchanges than the "1/2 mile rule" offers, but under the proposed amendments, regional plans would be required to include a strategy for completing Interchange Area Management Plans (IAMPs) to replace the "1/2 mile rule" for metropolitan areas. Interchange Area Management Plans already exist in state regulations, and can better address the complexities of urban interchanges. The proposed amendments also include better definition of TPR terminology used in these provisions to address the dispute over the scope of the recent rule changes, including clarity of what constitutes a "funding plan" versus a "funding mechanism."

ODOT as a Land Use Authority

The caveat to the 1/2 mile rule is that ODOT staff will be allowed to determine if additional improvements beyond the RTP financially constrained system are deemed "reasonably likely" to occur, ~~a discretionary interpretation that would occur outside the~~ planning process, and put ODOT staff in the position of deciding land use actions in affected areas. This provision represents a departure from Oregon's planning tradition where local elected officials adopt comprehensive plans in a public process intended to provide certainty in the development process. The effect of this provision would be to allow ODOT to make discretionary, arbitrary decisions that second-guess local policy makers on major planning decisions.

It's also unclear how this could be applied in our region, since most of the affected highway corridors are deferred to refinement plans, and have no major improvements identified in the RTP until individual corridor plans are complete. Thus, ODOT staff would be in the position of choosing projects that don't exist in the RTP in order to use this

provision to "approve" plan amendments. This determination by ODOT requires no public process for evaluating the merit or impacts of such projects.

Metro opposes the "reasonably likely" provisions because it places ODOT in an inappropriate role as decision maker in the planning process, and could undermine the region's effort to concentrate future growth in existing urban centers and corridors in an effort to reduce urban sprawl. The draft amendments to the TPR that would limit the scope and impact of this provision in our region and reinforce the current practices used in evaluating comprehensive plan amendments. However, the proposed amendments do not seek to strike the provision, since there seems to be strong interest by the State in retaining this option.

In order to be considered by the LCDC, the proposed amendments must be considered by JPACT, MPAC and the Council by early July, with the request that the regional policy makers forward them to the LCDC for consideration in the final stages of the TPR update. The Metro Council has also reserved the option to petition for rulemaking, should other avenues for addressing our concerns fail.

June 24, 2005

John VanLandingham, Chair
Land Conservation and Development Commission
635 Capitol St., NE
Suite 150
Salem, OR 97301-2540

Dear Chair VanLandingham:

Thank you for the opportunity to comment on update to the Oregon Transportation Planning Rule (TPR). We commend the joint OTC/LCDC Transportation Subcommittee for producing these amendments in such a short time frame, and support the Commission's effort to remedy the critical issues raised by the Jaqua vs. City of Springfield case. In our prior comments we have argued that the Jaqua case is simply a call for "fine tuning" amendments to the TPR, and not change the fundamental direction of the rule. The following comments on Section 660-012-0060 are provided in support of this principle of fine tuning the TPR:

Clarifying Funding Plans vs. Funding Mechanisms

The recent amendments to the TPR resulted in a confusing mix of transportation funding terminology that requires clarification in order to avoid invalidating currently acknowledged transportation system plans (TSP) in the Metro region. For the purpose of the rule, we recommend that "funding plans" be defined as a TSP element where a strategy, or range of strategies, establish a road map for funding transportation revenue shortfalls during the 20-year plan period. Conversely, "funding mechanisms" would be identified as adopted or approved sources of transportation revenue that can be used to fund projects and programs identified in TSPs.

The proposed amendments in Attachment 'A' distinguish between these terms, and clarify how they apply to plan amendments in "interchange" areas and other areas within a locality. We recently learned of DLCD staff's new interpretation of what a "funding plan" constitutes, and strongly disagree that the recent TPR amendments were intended to change this definition as it was applied in the acknowledgement of our regional transportation plan in 2000. The proposed amendments would confirm the original interpretation of a "funding plan" to be part of shaping a long-range planning process, and not the state of current funding policies.

The amendments would also reduce the need to rely on ODOT interpretations of "reasonably likely" transportation improvements, which will introduce great uncertainty and ambiguity (and resulting litigation), as well as a new step in the already complicated local planning process. Metro urges greater

reliance upon consultation and coordination between ODOT and local governments at the interchange management planning level to protect the functions and capacity of interstate interchanges.

Interchange Management Strategy

We continue to oppose the "1/2 mile rule", a new layer of planning regulations intended to protect interstate highway interchanges from overdevelopment. As you know, Metro shares the state's concern for protecting the capacity and function of interstate interchanges. But the 1/2-mile rule is overly simplistic, particularly for urban areas where even the definition for measuring this radius cannot be applied to many interchanges. Instead, we support the use of interchange area management plans (IAMPs) in these areas, an existing tool that offers the best protection for interchanges, but has been largely unfunded by ODOT.

The proposed amendments to the TPR shown in Attachment 'A' would require Metropolitan Planning Organizations (MPOs) to develop an interchange management strategy as part of adopting a regional TSP. The strategy would establish priorities and timing for completion of interchange area managements plans for areas governed by MPOs. ODOT would be strongly encouraged to participate in the completion of IAMPs for these areas, since the investment in completing this work represents a fraction of what just one interchange construction project could cost in the event of an inappropriate land use decision in an interchange area.

We look forward to continued participation and comment as the remaining portions of the TPR are reviewed by the Commission in coming months. Thank you for the opportunity to comment on this important effort.

Sincerely,

Rex Burkholder
JPACT Chair

Jack Hoffman
MPAC Chair

David Bragdon
Metro Council President

cc: Members of the LCDC

Lane Shetterly, Department of Land Conservation and Development
Members of the Oregon Transportation Commission
Bruce Warner, Oregon Department of Transportation

Attachment 'A'

660-012-0005 - Definitions

(7) "Funding Plan" means a reasonable strategy or range of strategies adopted in a local transportation system plan that addresses identified funding shortfalls during the planning period.

(8) "Funding Mechanism" means an adopted or approved transportation revenue source used to finance projects and programs included in local transportation system plans.

(9) "Interchange Management Strategy" means an adopted strategy for developing interchange management plans in MPO areas.

660-012-0060 - Plan and Land Use Regulation Amendments

(1) Where an amendment to a functional plan, an acknowledged comprehensive plan, or a land use regulation would significantly affect an existing or planned transportation facility, the local government shall put in place measures as provided in section (2) of this rule to assure that allowed land uses are consistent with the identified function, capacity, and performance standards (e.g. level of service, volume to capacity ratio, etc.) of the facility. A plan or land use regulation amendment significantly affects a transportation facility if it would:

(a) Change the functional classification of an existing or planned transportation facility (exclusive of correction of map errors in an adopted plan);

(b) Change standards implementing a functional classification system; or

(c) As measured at the end of the planning period identified in the adopted transportation system plan:

(A) Allow land uses or levels of development that would result in types or levels of travel or access that are inconsistent with the functional classification of an existing or planned transportation facility;

(B) Reduce the performance of an existing or planned transportation facility below the minimum acceptable performance standard identified in the TSP or comprehensive plan; or

(C) Worsen the performance of an existing or planned transportation facility that is otherwise projected to perform below the minimum acceptable performance standard identified in the TSP or comprehensive plan.

(2) Where a local government determines that there would be a significant effect, compliance with section (1) shall be accomplished through one or a combination of the following:

(a) Adopting measures that demonstrate allowed land uses are consistent with the planned function, capacity, and performance standards of the transportation facility.

(b) Amending the TSP or comprehensive plan to provide transportation facilities, improvements or services adequate to support the proposed land uses consistent with the requirements of this division; such amendments shall include a funding plan ~~or funding mechanisms~~ consistent with section (4) or include an amendment to the transportation finance plan so that the facility, improvement, or service will be provided by the end of the planning period.

(c) Altering land use designations, densities, or design requirements to reduce demand for automobile travel and meet travel needs through other modes.

(d) Amending the TSP to modify the planned function, capacity or performance standards of the transportation facility.

(e) Providing other measures as a condition of development or through a development agreement or similar funding method, including transportation system management measures, demand management or minor transportation improvements. Local governments shall as part of the amendment specify when measures or improvements provided pursuant to this subsection will be provided.

(3) Notwithstanding sections (1) and (2) of this rule, a local government may approve an amendment that would significantly affect an existing transportation facility without assuring that the allowed land uses are consistent with the function, capacity and performance standards of the facility where:

(a) The facility is already performing below the minimum acceptable performance standard identified in the TSP or comprehensive plan on the date the amendment application is submitted;

(b) In the absence of the amendment, planned transportation facilities, improvements and services as set forth in section (4) of this rule would not be adequate to achieve consistency with the identified function, capacity or performance standard for that facility by the end of the planning period identified in the adopted TSP;

(c) Development resulting from the amendment will, at a minimum, mitigate the impacts of the amendment in a manner that avoids further degradation to the performance of the facility by the time of the development through one or a combination of transportation improvements or measures;

(d) The amendment does not involve property located in an interchange area as defined in paragraph (4)(d)(C); and

(e) For affected state highways, ODOT provides a written statement that the proposed funding and timing for the identified mitigation improvements or measures are, at a minimum, sufficient to avoid further degradation to the performance of the affected state highway. However, if a local government provides the appropriate ODOT regional office with written notice of a proposed amendment in a manner that

provides ODOT reasonable opportunity to submit a written statement into the record of the local government proceeding, and ODOT does not provide a written statement, then the local government may proceed with applying subsections (a) through (d) of this section.

(4) Determinations under sections (1)-(3) of this rule shall be coordinated with affected transportation facility and service providers and other affected local governments.

(a) In determining whether an amendment has a significant effect on an existing or planned transportation facility under subsection (1)(c) of this rule, local governments shall rely on existing transportation facilities and services and on the planned transportation facilities, improvements and services set forth in subsections (b) and (c) below.

(b) Outside of interstate interchange areas, the following are considered planned facilities, improvements and services:

(A) Transportation facilities, improvements or services that are funded for construction or implementation in the Statewide Transportation Improvement Program or a locally or regionally adopted transportation improvement program or capital improvement plan or program of a transportation service provider.

(B) Transportation facilities, improvements or services that are authorized in a local transportation system plan and for which a funding plan or funding mechanism is in place or approved. ~~These funding mechanisms~~ include, but are not limited to, transportation facilities, improvements or services for which: transportation systems development charge revenues are being collected; a local improvement district or reimbursement district has been established or will be established prior to development; a development agreement has been adopted; or conditions of approval to fund the improvement have been adopted.

(C) Transportation facilities, improvements or services in a metropolitan planning organization (MPO) area that are part of the area's federally-approved, financially constrained regional transportation system plan.

(D) Improvements to state highways that are included as planned improvements in a regional or local transportation system plan or comprehensive plan when ODOT provides a written statement that the improvements are reasonably likely to be provided by the end of the planning period.

(E) Improvements to regional and local roads, streets or other transportation facilities or services that are included as planned improvements in a regional or local transportation system plan or comprehensive plan when the local government(s) or transportation service provider(s) responsible for the facility, improvement or service provides a written statement that the facility, improvement or service is reasonably likely to be provided by the end of the planning period.

(c) Within interstate interchange areas, the improvements included in (b)(A), (B) and those planned pursuant to funding mechanisms in (C) are considered planned facilities, improvements and services, except where one of the following applies:

(A) ODOT provides a written statement that the proposed funding and timing of mitigation measures are sufficient to avoid a significant adverse impact on the Interstate Highway system, then local governments may also rely on the improvements identified in paragraphs (b)(D) and (E) of this section; or

(B) There is an adopted interchange area management plan, then local governments may also rely on the improvements identified in that plan and which are also identified in paragraphs (b)(D) and (E) of this section.

(C) There is an adopted interchange management strategy in a regional transportation system plan in MPO areas.

(d) As used in this section and section (3):

(A) Planned interchange means new interchanges and relocation of existing interchanges that are authorized in an adopted transportation system plan or comprehensive plan;

(B) Interstate highway means Interstates 5, 82, 84, 105, 205 and 405; and

(C) Interstate interchange area means:

(i) Property within one-half mile of an existing or planned interchange on an Interstate Highway as measured from the center point of the interchange; or

(ii) The interchange area as defined in the Interchange Area Management Plan adopted as an amendment to the Oregon Highway Plan.

(D) Interchange management strategy means an adopted strategy for developing interchange management plans in MPO areas. Interchange management strategies establish priorities and timing for completion of interchange management plans for areas governed by MPOs.

(e) For purposes of this section, a written statement provided pursuant to paragraphs (b)(D), (b)(E) or (c)(A) provided by ODOT, a local government or transportation facility provider, as appropriate, shall be conclusive in determining whether a transportation facility, improvement or service is a planned transportation facility, improvement or service. In the absence of a written statement, a local government can only rely upon planned transportation facilities, improvements and services identified in paragraphs (b)(A)-(C) to determine whether there is a significant effect that requires application of the remedies in section (2).

(5) The presence of a transportation facility or improvement shall not be a basis for an exception to allow residential, commercial, institutional or industrial development on rural lands under this division or OAR 660-004-0022 and 660-004-0028.

(6) In determining whether proposed land uses would affect or be consistent with planned transportation facilities as provided in 0060(1) and (2), local governments shall give full credit for potential reduction in vehicle trips for uses located in mixed-use, pedestrian-friendly centers, and neighborhoods as provided in (a)-(d) below;

(a) Absent adopted local standards or detailed information about the vehicle trip reduction benefits of mixed-use, pedestrian-friendly development, local governments shall assume that uses located within a mixed-use, pedestrian-friendly center, or neighborhood, will generate 10% fewer daily and peak hour trips than are specified in available published estimates, such as those provided by the Institute of Transportation Engineers (ITE) Trip Generation Manual that do not specifically account for the effects of mixed-use, pedestrian-friendly development. The 10% reduction allowed for by this section shall be available only if uses which rely solely on auto trips, such as gas stations, car washes, storage facilities, and motels are prohibited;

(b) Local governments shall use detailed or local information about the trip reduction benefits of mixed-use, pedestrian-friendly development where such information is available and presented to the local government. Local governments may, based on such information, allow reductions greater than the 10% reduction required in (a);

(c) Where a local government assumes or estimates lower vehicle trip generation as provided in (a) or (b) above, it shall assure through conditions of approval, site plans, or approval standards that subsequent development approvals support the development of a mixed-use, pedestrian-friendly center or neighborhood and provide for on-site bike and pedestrian connectivity and access to transit as provided for in 0045(3) and (4). The provision of on-site bike and pedestrian connectivity and access to transit may be accomplished through application of acknowledged ordinance provisions which comply with 0045(3) and (4) or through conditions of approval or findings adopted with the plan amendment that assure compliance with these rule requirements at the time of development approval; and

(d) The purpose of this section is to provide an incentive for the designation and implementation of pedestrian-friendly, mixed-use centers and neighborhoods by lowering the regulatory barriers to plan amendments which accomplish this type of development. The actual trip reduction benefits of mixed-use, pedestrian-friendly development will vary from case to case and may be somewhat higher or lower than presumed pursuant to (a) above. The Commission concludes that this assumption is warranted given general information about the expected effects of mixed-use, pedestrian-friendly development and its intent to encourage changes to plans and development patterns. Nothing in this section is intended to affect the application of provisions in local plans or ordinances which provide for the calculation or assessment of systems development charges or in preparing conformity determinations required under the federal Clean Air Act.

(7) Amendments to acknowledged comprehensive plans and land use regulations which meet all of the criteria listed in (a)-(c) below shall include an amendment to the comprehensive plan, transportation system plan the adoption of a local street plan, access

management plan, future street plan or other binding local transportation plan to provide for on-site alignment of streets or accessways with existing and planned arterial, collector, and local streets surrounding the site as necessary to implement the requirements in Section 0020(2)(b) and Section 0045(3) of this division:

(a) The plan or land use regulation amendment results in designation of two or more acres of land for commercial use;

(b) The local government has not adopted a TSP or local street plan which complies with Section 0020(2)(b) or, in the Portland Metropolitan Area, has not complied with Metro's requirement for street connectivity as contained in Chapter 6 of the Regional Transportation Plan, Title 6, Section 3 of the Urban Growth Management Functional Plan; and

(c) The proposed amendment would significantly affect a transportation facility as provided in 0060(1).

(8) A "mixed-use, pedestrian-friendly center or neighborhood" for the purposes of this rule, means:

(a) Any one of the following:

(A) An existing central business district or downtown;

(B) An area designated as a central city, regional center, town center or main street in the Portland Metro 2040 Regional Growth Concept;

(C) An area designated in an acknowledged comprehensive plan as a transit oriented development or a pedestrian district; or

(D) An area designated as a special transportation area as provided for in the Oregon Highway Plan.

(b) An area other than those listed in (a) which includes or is planned to include the following characteristics:

(A) A concentration of a variety of land uses in a well-defined area, including the following:

(i) Medium to high density residential development (12 or more units per acre);

(ii) Offices or office buildings;

(iii) Retail stores and services;

(iv) Restaurants; and

(v) Public open space or private open space which is available for public use, such as a park or plaza.

(B) Generally include civic or cultural uses;

(C) A core commercial area where multi-story buildings are permitted;

(D) Buildings and building entrances oriented to streets;

(E) Street connections and crossings that make the center safe and conveniently accessible from adjacent areas;

(F) A network of streets and, where appropriate, accessways and major driveways that make it attractive and highly convenient for people to walk between uses within the center or neighborhood, including streets and major driveways within the center with wide sidewalks and other features, including pedestrian-oriented street crossings, street trees, pedestrian-scale lighting and on-street parking;

(G) One or more transit stops (in urban areas with fixed route transit service); and

(H) Limit or do not allow low-intensity or land extensive uses, such as most industrial uses, automobile sales and services, and drive-through services.

Stat. Auth.: ORS 183 & 197.040

Stats. Implemented: ORS 195.025, 197.040, 197.230, 197.245, 197.610 - 197.625, 197.628 - 197.646, 197.712, 197.717 & 197.732

Hist.: LCDC 1-1991, f. & cert. ef. 5-8-91; LCDD 6-1998, f. & cert. ef. 10-30-98; LCDD 6-1999, f. & cert. ef. 8-6-99; LCDD 3-2005, f. & cert. ef. 4-11-05

July 14, 2005

John VanLandingham, Chair
Land Conservation and Development Commission
635 Capitol Street NE, Suite 150
Salem, OR 97301-2540

Dear Chair VanLandingham:

Thank you for the opportunity to comment on the recent update to the Oregon Transportation Planning Rule (TPR). We commend the joint OTC/LCDC Transportation Subcommittee for producing these amendments in such a short time frame, and support the Commission's effort to remedy the critical issues raised by the Jaqua vs. City of Springfield case. However, we view some of the new provisions as substantial changes to the rule that go beyond the needed remedy to the Jaqua case, and shift the purpose of the rule away from the intent of Goal 12 Transportation.

When the Commission adopted these recent amendments, you encouraged local agencies to work with the Commission to fine-tune the rule to best meet state and local planning needs. We have since engaged our local and regional partners in the Metro region in a review of the new TPR provisions, and offer the following comments on Section 660-012-0060 in the spirit of fine-tuning the TPR. We believe that these amendments build on existing strengths of the TPR, while also recognizing the complexity of planning in larger urban settings.

Our comments focus on the "1/2 mile rule", in particular. The "1/2 mile rule" represents a shift in purpose for the TPR away from transportation planning conducted as a way to ensure an efficient, compact urban form to one driven by financial constraints. The changes we are proposing are offered with an overriding concern that these new provisions will frustrate the region's efforts to implement the Region 2040 Growth Concept in many areas. We also see an unintended effect of this new regulation, which we believe will simply push development from congested interchanges to the urban fringe or neighbor cities, where road capacity is still available. The "1/2 mile rule" also fails to protect facilities adequately in an urban setting, where interchanges generally serve much larger areas, and the most critical interchange access considerations fall outside the 1/2 mile radius. Attachment 'A' to this letter proposes changes to the TPR that we believe would help remedy unintended effect. Attachment 'B' contains detailed examples of where the "1/2 mile rule" would interfere with planned implementation of the 2040 Growth Concept.

We share the state's commitment to protect the public investment in highway interchanges against inappropriate land use actions, but also believe that a more effective alternative to "the 1/2 mile rule" is needed in urban areas. While we have a small share of the state's highway interchanges, they also serve as gateways to the state's most important marine and air terminals, and provide primary access to public facilities like the Oregon Convention Center, Oregon Health and Science University, Central Post Office, Portland State University, Oregon Zoo, Metro Expo Center and many other cultural, commercial, medical and recreational destinations that serve residents of the entire state. Thus, we are keenly aware of the need to protect these access points over the long term.

Clarifying Funding Plans vs. Funding Mechanisms

The recent amendments to the TPR resulted in a confusing mix of transportation funding terminology that requires clarification in order to avoid invalidating currently acknowledged transportation system plans (TSPs) in the Metro region. For the purpose of the rule, we recommend that "funding plans" be defined as a TSP element where a strategy, or range of strategies, establish a road map for funding transportation revenue shortfalls during the 20-year plan period. Conversely, "funding mechanisms" would be identified as adopted or approved sources of transportation revenue that can be used to fund projects and programs identified in TSPs.

The proposed amendments in Attachment 'A' distinguish between these terms, and clarify how they apply to plan amendments in interchange areas and other areas within a locality. We recently learned of DLCD staff's new interpretation of what a "funding plan" constitutes, and strongly disagree that the recent TPR amendments were intended to change this definition as it was applied in the acknowledgement of our regional transportation plan in 2000. The sharp difference of interpretation between state agencies and local jurisdictions on the current language is evidence of the need to clarify the terminology. The proposed amendments would confirm the original interpretation of a "funding plan" to be part of shaping a long-range planning process, and not the state of current funding policies.

The amendments would also reduce the need to rely on ODOT interpretations of "reasonably likely" transportation improvements, which will introduce great uncertainty and ambiguity (and likely litigation), as well as a new step in the already complicated local planning process. Local officials in the Metro region expressed concern over placing the role of an ODOT administrator above that of elected policy makers in making land use decisions, a significant departure from current practice. Instead, we believe that better interchange protections are possible through improved consultation and coordination between ODOT and local governments, as suggested below.

Interchange Management Strategy

We continue to oppose the "1/2 mile rule" as a new layer of planning, and do not believe it is an effective strategy for protecting urban interstate highway interchanges from overdevelopment. The "1/2-mile rule" is overly simplistic, particularly for urban areas where even the definition for measuring this radius cannot be applied to many interchanges. Instead, we support the use of interchange area management plans (IAMPs) in these areas, an existing tool that offers the best protection for interchanges, but has been largely unfunded by ODOT.

Our proposal is based on a review of the interchanges located within the Metro region, and upon consultation with the Oregon MPO Consortium, which includes members from the Salem-Keizer, Eugene-Springfield, Rogue Valley, Corvallis and Bend MPOs. Our finding is that the "1/2 mile rule" would not only block desired land use plans in existing urban areas, where compact development is proposed near interchanges, but also have the subsequent effect of pushing development toward the urban fringe, where the greatest interchange capacity exists in the state's larger urban areas. This effect is clearly in conflict with statewide planning goals to limit sprawl and promote compact development. Attachment 'B' to this letter provides a more detailed series of examples where current efforts to implement the 2040 Growth Concept would be frustrated by the "1/2 mile rule".

The "1/2 mile rule" also ignores the reality that, in larger urban areas, a much larger area might necessarily be managed as part of protecting interchanges. For example, in the Metro region, the Marine Drive interchange on Interstate-5 serves the major marine terminals of the Portland Harbor, yet all are located outside the 1/2 mile area. We believe that IAMPs provide a better alternative for customizing a strategy that meets the needs of each interchange, such as Marine Drive.

The proposed amendments to the TPR shown in Attachment 'A' would require Metropolitan Planning Organizations (MPOs) to develop an interchange management strategy as part of adopting a regional TSP. The strategy would establish priorities and timing for completion of interchange area managements plans for areas governed by MPOs, and is modeled after the existing "refinement planning" provisions of the TPR. The approach is also based on the notion that the TPR already calls out MPOs as unique in their transportation needs, and thus ties the interchange management responsibility to the regional TSPs that are required for the six MPOs.

ODOT would be strongly encouraged to participate in the completion of IAMPs for these areas, since the investment in completing this work represents a fraction of what just one interchange construction project could cost in the event of an inappropriate land use decision in an interchange

area. It should be noted, however, that much of the corridor planning, and even some capital improvements to ODOT highways in the Metro region are now being funded with local or regional dollars. We strongly recommend that ODOT make a meaningful investment in protecting interchanges by funding the IAMP efforts for critical facilities. ODOT has already begun this effort in the Metro region by preparing an analysis of "at risk" interchanges, but the Region 1 office will need funding support from the OTC to complete this work.

Conclusion

We look forward to continued participation and comment on the remaining portions of the TPR as Commission completes its review. We hope that the fine-tuning changes we are proposing to recently adopted amendments will also be considered by the Commission as you complete your review of the TPR. We are committed to finding a workable solution to better protecting our interchange investments, and appreciate the opportunity to comment on this important effort.

Sincerely,

Rex Burkholder
JPACT Chair

Jack Hoffman
MPAC Chair

David Bragdon
Metro Council President

cc: Members of the LCDC
Lane Shetterly, Department of Land Conservation and Development
Members of the Oregon Transportation Commission
Director, Oregon Department of Transportation

Attachment 'A'

660-012-0005 - Definitions

(7) "Funding Plan" means a reasonable strategy or range of strategies adopted in a local transportation system plan that addresses identified funding shortfalls during the planning period.

(8) "Funding Mechanism" means an adopted or approved transportation revenue source used to finance projects and programs included in local transportation system plans.

(9) "Interchange Management Strategy" means an adopted strategy for developing interchange management plans in MPO areas.

660-012-0060 - Plan and Land Use Regulation Amendments

(1) Where an amendment to a functional plan, an acknowledged comprehensive plan, or a land use regulation would significantly affect an existing or planned transportation facility, the local government shall put in place measures as provided in section (2) of this rule to assure that allowed land uses are consistent with the identified function, capacity, and performance standards (e.g. level of service, volume to capacity ratio, etc.) of the facility. A plan or land use regulation amendment significantly affects a transportation facility if it would:

(a) Change the functional classification of an existing or planned transportation facility (exclusive of correction of map errors in an adopted plan);

(b) Change standards implementing a functional classification system; or

(c) As measured at the end of the planning period identified in the adopted transportation system plan:

(A) Allow land uses or levels of development that would result in types or levels of travel or access that are inconsistent with the functional classification of an existing or planned transportation facility;

(B) Reduce the performance of an existing or planned transportation facility below the minimum acceptable performance standard identified in the TSP or comprehensive plan; or

(C) Worsen the performance of an existing or planned transportation facility that is otherwise projected to perform below the minimum acceptable performance standard identified in the TSP or comprehensive plan.

(2) Where a local government determines that there would be a significant effect, compliance with section (1) shall be accomplished through one or a combination of the following:

(a) Adopting measures that demonstrate allowed land uses are consistent with the planned function, capacity, and performance standards of the transportation facility.

(b) Amending the TSP or comprehensive plan to provide transportation facilities, improvements or services adequate to support the proposed land uses consistent with the requirements of this division; such amendments shall include a funding plan or funding mechanisms consistent with section (4) or include an amendment to the transportation finance plan so that the facility, improvement, or service will be provided by the end of the planning period.

(c) Altering land use designations, densities, or design requirements to reduce demand for automobile travel and meet travel needs through other modes.

(d) Amending the TSP to modify the planned function, capacity or performance standards of the transportation facility.

(e) Providing other measures as a condition of development or through a development agreement or similar funding method, including transportation system management measures, demand management or minor transportation improvements. Local governments shall as part of the amendment specify when measures or improvements provided pursuant to this subsection will be provided.

(3) Notwithstanding sections (1) and (2) of this rule, a local government may approve an amendment that would significantly affect an existing transportation facility without assuring that the allowed land uses are consistent with the function, capacity and performance standards of the facility where:

(a) The facility is already performing below the minimum acceptable performance standard identified in the TSP or comprehensive plan on the date the amendment application is submitted;

(b) In the absence of the amendment, planned transportation facilities, improvements and services as set forth in section (4) of this rule would not be adequate to achieve consistency with the identified function, capacity or performance standard for that facility by the end of the planning period identified in the adopted TSP;

(c) Development resulting from the amendment will, at a minimum, mitigate the impacts of the amendment in a manner that avoids further degradation to the performance of the facility by the time of the development through one or a combination of transportation improvements or measures;

(d) The amendment does not involve property located in an interchange area as defined in paragraph (4)(d)(C); and

(e) For affected state highways, ODOT provides a written statement that the proposed funding and timing for the identified mitigation improvements or measures are, at a minimum, sufficient to avoid further degradation to the performance of the affected state highway. However, if a local government provides the appropriate ODOT regional office with written notice of a proposed amendment in a manner that provides ODOT reasonable opportunity to submit a written statement into the record

of the local government proceeding, and ODOT does not provide a written statement, then the local government may proceed with applying subsections (a) through (d) of this section.

(4) Determinations under sections (1)-(3) of this rule shall be coordinated with affected transportation facility and service providers and other affected local governments.

(a) In determining whether an amendment has a significant effect on an existing or planned transportation facility under subsection (1)(c) of this rule, local governments shall rely on existing transportation facilities and services and on the planned transportation facilities, improvements and services set forth in subsections (b) and (c) below.

(b) Outside of interstate interchange areas, the following are considered planned facilities, improvements and services:

(A) Transportation facilities, improvements or services that are funded for construction or implementation in the Statewide Transportation Improvement Program or a locally or regionally adopted transportation improvement program or capital improvement plan or program of a transportation service provider.

(B) Transportation facilities, improvements or services that are authorized in a local transportation system plan and for which a funding plan or funding mechanism is in place or approved. These funding mechanisms include, but are not limited to, transportation facilities, improvements or services for which: transportation systems development charge revenues are being collected; a local improvement district or reimbursement district has been established or will be established prior to development; a development agreement has been adopted; or conditions of approval to fund the improvement have been adopted.

(C) Transportation facilities, improvements or services in a metropolitan planning organization (MPO) area that are part of the area's federally-approved, financially constrained regional transportation system plan.

(D) Improvements to state highways that are included as planned improvements in a regional or local transportation system plan or comprehensive plan when ODOT provides a written statement that the improvements are reasonably likely to be provided by the end of the planning period.

(E) Improvements to regional and local roads, streets or other transportation facilities or services that are included as planned improvements in a regional or local transportation system plan or comprehensive plan when the local government(s) or transportation service provider(s) responsible for the facility, improvement or service provides a written statement that the facility, improvement or service is reasonably likely to be provided by the end of the planning period.

(c) Within interstate interchange areas, the improvements included in (b)(A)-(C) are considered planned facilities, improvements and services, except where one of the following applies:

(A) ODOT provides a written statement that the proposed funding and timing of mitigation measures are sufficient to avoid a significant adverse impact on the Interstate Highway system, then local governments may also rely on the improvements identified in paragraphs (b)(D) and (E) of this section; or

(B) There is an adopted interchange area management plan, then local governments may also rely on the improvements identified in that plan and which are also identified in paragraphs (b)(D) and (E) of this section.

(C) There is an adopted interchange management strategy in a regional transportation system plan in MPO areas.

(d) As used in this section and section (3):

(A) Planned interchange means new interchanges and relocation of existing interchanges that are authorized in an adopted transportation system plan or comprehensive plan;

(B) Interstate highway means Interstates 5, 82, 84, 105, 205 and 405; and

(C) Interstate interchange area means:

(i) Property within one-half mile of an existing or planned interchange on an Interstate Highway as measured from the center point of the interchange; or

(ii) The interchange area as defined in the Interchange Area Management Plan adopted as an amendment to the Oregon Highway Plan.

(D) Interchange management strategy means an adopted strategy for developing interchange management plans in MPO areas. Interchange management strategies establish priorities and timing for completion of interchange management plans for areas governed by MPOs.

(e) For purposes of this section, a written statement provided pursuant to paragraphs (b)(D), (b)(E) or (c)(A) provided by ODOT, a local government or transportation facility provider, as appropriate, shall be conclusive in determining whether a transportation facility, improvement or service is a planned transportation facility, improvement or service. In the absence of a written statement, a local government can only rely upon planned transportation facilities, improvements and services identified in paragraphs (b)(A)-(C) to determine whether there is a significant effect that requires application of the remedies in section (2).

(5) The presence of a transportation facility or improvement shall not be a basis for an exception to allow residential, commercial, institutional or industrial development on rural lands under this division or OAR 660-004-0022 and 660-004-0028.

(6) In determining whether proposed land uses would affect or be consistent with planned transportation facilities as provided in 0060(1) and (2), local governments shall give full

credit for potential reduction in vehicle trips for uses located in mixed use, pedestrian friendly centers, and neighborhoods as provided in (a)-(d) below;

(a) Absent adopted local standards or detailed information about the vehicle trip reduction benefits of mixed-use, pedestrian-friendly development, local governments shall assume that uses located within a mixed-use, pedestrian-friendly center, or neighborhood, will generate 10% fewer daily and peak hour trips than are specified in available published estimates, such as those provided by the Institute of Transportation Engineers (ITE) Trip Generation Manual that do not specifically account for the effects of mixed-use, pedestrian-friendly development. The 10% reduction allowed for by this section shall be available only if uses which rely solely on auto trips, such as gas stations, car washes, storage facilities, and motels are prohibited;

(b) Local governments shall use detailed or local information about the trip reduction benefits of mixed-use, pedestrian-friendly development where such information is available and presented to the local government. Local governments may, based on such information, allow reductions greater than the 10% reduction required in (a);

(c) Where a local government assumes or estimates lower vehicle trip generation as provided in (a) or (b) above, it shall assure through conditions of approval, site plans, or approval standards that subsequent development approvals support the development of a mixed-use, pedestrian-friendly center or neighborhood and provide for on-site bike and pedestrian connectivity and access to transit as provided for in 0045(3) and (4). The provision of on-site bike and pedestrian connectivity and access to transit may be accomplished through application of acknowledged ordinance provisions which comply with 0045(3) and (4) or through conditions of approval or findings adopted with the plan amendment that assure compliance with these rule requirements at the time of development approval; and

(d) The purpose of this section is to provide an incentive for the designation and implementation of pedestrian-friendly, mixed-use centers and neighborhoods by lowering the regulatory barriers to plan amendments which accomplish this type of development. The actual trip reduction benefits of mixed-use, pedestrian-friendly development will vary from case to case and may be somewhat higher or lower than presumed pursuant to (a) above. The Commission concludes that this assumption is warranted given general information about the expected effects of mixed-use, pedestrian-friendly development and its intent to encourage changes to plans and development patterns. Nothing in this section is intended to affect the application of provisions in local plans or ordinances which provide for the calculation or assessment of systems development charges or in preparing conformity determinations required under the federal Clean Air Act.

(7) Amendments to acknowledged comprehensive plans and land use regulations which meet all of the criteria listed in (a)-(c) below shall include an amendment to the comprehensive plan, transportation system plan the adoption of a local street plan, access management plan, future street plan or other binding local transportation plan to provide for on-site alignment of streets or accessways with existing and planned arterial, collector, and local streets surrounding the site as necessary to implement the requirements in Section 0020(2)(b) and Section 0045(3) of this division:

(a) The plan or land use regulation amendment results in designation of two or more acres of land for commercial use;

(b) The local government has not adopted a TSP or local street plan which complies with Section 0020(2)(b) or, in the Portland Metropolitan Area, has not complied with Metro's requirement for street connectivity as contained in Chapter 6 of the Regional Transportation Plan Title 6, Section 3 of the Urban Growth Management Functional Plan; and

(c) The proposed amendment would significantly affect a transportation facility as provided in 0060(1).

(8) A "mixed-use, pedestrian-friendly center or neighborhood" for the purposes of this rule, means:

(a) Any one of the following:

(A) An existing central business district or downtown;

(B) An area designated as a central city, regional center, town center or main street in the Portland Metro 2040 Regional Growth Concept;

(C) An area designated in an acknowledged comprehensive plan as a transit oriented development or a pedestrian district; or

(D) An area designated as a special transportation area as provided for in the Oregon Highway Plan.

(b) An area other than those listed in (a) which includes or is planned to include the following characteristics:

(A) A concentration of a variety of land uses in a well-defined area, including the following:

(i) Medium to high density residential development (12 or more units per acre);

(ii) Offices or office buildings;

(iii) Retail stores and services;

(iv) Restaurants; and

(v) Public open space or private open space which is available for public use, such as a park or plaza.

(B) Generally include civic or cultural uses;

(C) A core commercial area where multi-story buildings are permitted;

(D) Buildings and building entrances oriented to streets;

(E) Street connections and crossings that make the center safe and conveniently accessible from adjacent areas;

(F) A network of streets and, where appropriate, accessways and major driveways that make it attractive and highly convenient for people to walk between uses within the center or neighborhood, including streets and major driveways within the center with wide sidewalks and other features, including pedestrian-oriented street crossings, street trees, pedestrian-scale lighting and on-street parking;

(G) One or more transit stops (in urban areas with fixed route transit service); and

(H) Limit or do not allow low-intensity or land extensive uses, such as most industrial uses, automobile sales and services, and drive-through services.

Stat. Auth.: ORS 183 & 197.040

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Hist.: LCDC 1-1991, f. & cert. ef. 5-8-91; LCDD 6-1998, f. & cert. ef. 10-30-98; LCDD 6-1999, f. & cert. ef. 8-6-99; LCDD 3-2005, f. & cert. ef. 4-11-05

Attachment 'B'

The following are local examples of how the "1/2 Mile Rule" could impact current efforts to implement the Region 2030 Growth Concept along interstate highway corridors:

Interstate-84 Interchanges

1. **NE 60th Ave and NE 82nd Avenue Station Communities:** The City of Portland is seeking Transportation Growth Management (TGM) funds to study eastside station areas; for these two specific areas, the primary goal is the improvement the pedestrian environment for neighborhood access to the light rail stations.
2. **Multnomah County Farm property at 242nd Avenue:** this 46 acres site across from Edgefield development is currently zoned Light Industrial, but within Troutdale's town center boundary. Multnomah County is currently marketing the property, and the City expects it to change to a mixed use or commercial land use designation, consistent with the 2040 plan.

Interstate-205 Interchanges

1. **Parkrose/Sumner Town Center:** The City of Portland is seeking TGM funds to study this eastside station area located at the Sandy Boulevard interchange, and expects a change in land use designations.
2. **Market/Main Street Station Community:** this interchange area is within the Gateway Urban Renewal area and it has already been zoned for higher density development; however, additional changes to zoning may accompany the construction of the I-205 light rail line.
3. **Stark/Washington and Glisan/Halsey Interchanges:** TriMet and the PDC are partnering on redevelopment projects in the Gateway Regional Center, including replacing the existing surface park and ride with a mixed-used development and parking structure. As such developments become more specific, zoning adjustments may be required. The Gateway area is an example where 2040-based zoning represents a substantial change in land use, and as these areas redevelop, changes to refine zoning to match emerging development trends are expected.
4. **Powell Boulevard Station Community:** the 2040 plan calls for a station community at the Powell Boulevard interchange upon completion of the I-205 light rail extension, and will require changes to existing plan and zoning designations to allow redevelopment to occur.
5. **Fuller Road Station Community:** this area is currently zoned for low traffic commercial, but the development on the ground is primarily (nonconforming) residential and is surrounded by big box retail. The station area is being considered as a site for a North County Clackamas Community College campus, which would probably have a medical training focus. Both transit and freeway access would be highly desirable for this facility, but new zoning would be required to permit a campus and accompanying mixed-use development at the Fuller Road station area.

6. **Clackamas Regional Center:** the County expects to complete additional station area planning in response to the I-205 light rail extension that will result in changes to the Clackamas Regional Center plan designations.

Interstate-5 Interchanges

1. **Central Eastside Development Opportunity Strategy:** The Portland Development Commission have been developing an investment strategy for this area, which includes most of the land between the Willamette River and Third Avenue in the Central Eastside. In conjunction with this effort, the Portland Bureau of Planning is proposing modifications of existing zones in the area to allow a broader range of uses that would create a more lively, diverse area than currently exists under the industrial sanctuary zoning. This area is served by the Water Avenue and Morrison Bridge interchanges.
2. **Interstate Avenue Station Communities –** The Portland Development Commission and Planning Bureau are engaged in a major update to zoning along the new Interstate MAX corridor that includes new land use designations, and urban renewal investments to spur mixed-use development. The zoning has not been fully implemented in these areas. They are largely within the continuous half-mile radius that includes the Broadway/Weidler, Going/Greely, Portland Boulevard, Lombard, Columbia and Marine Drive interchanges on Interstate-5. The specific 2040 plan designations include station communities at the following light rail stops within this corridor:
 - Interstate/Rose Quarter
 - Albina/Mississippi
 - Overlook Park
 - N Prescott St
 - N Killingsworth St
 - N Portland Blvd
 - N Lombard TC
 - Kenton/N Denver Ave
 - Delta Park/Vanport
 - Expo Center
3. **Burnside Bridgehead Planning:** the City of Portland is involved in new planning for the Burnside corridor and bridgehead area that will likely result in changes to zoning. This area is within the half-mile buffer of the Morrison Bridge interchange on I-5 and the Grand Avenue interchange on I-84.

Interstate-405 Interchanges

1. **River District Floor-Area Ratio Increases:** the City of Portland is involved in an update to River District zoning that would increase allowed floor-area ratios for development north of Lovejoy Street. These areas fall within the half-mile radius of the Everett Street ramps in I-405.

Future Effects on Implementing the 2040 Plan

1. **Barbur Corridor:** other corridors slated for high-capacity transit service would likely be impacted by the ½-mile interchange rule. In Portland, this includes the Barbur corridor, would have multiple high-capacity transit station areas within ½ mile of the Corbett, Terwilliger, Taylors Ferry and Multnomah Boulevard interchanges along I-5, and the West Portland Town Center at the Capitol Highway interchange.
2. **Washington Co. Commuter Rail:** of the five planned commuter rail station areas, two, Wilsonville and Tualatin, would be affected by the ½-mile Interstate highway interchange rule.
3. **Additional Interstate Light Rail Station Communities:** the 2040 plan calls for station communities at Delta Park/Hayden Meadows and Hayden Island.
4. **Northeast Broadway Main Street:** a plan for redevelopment of lower Broadway as a 2040 Main Street has not been implemented, and would fall within the half-mile radius of the Broadway/Weidler interchange on I-5.
5. **Macadam/Johns Landing Main Street:** a plan for redevelopment of SW Macadam as a 2040 Main Street has not been implemented, and would fall within the half-mile radius of the Macadam interchange on I-5.
6. **University District (PSU):** Plans call for a major update to zoning in the vicinity of Portland State University, which would be impacted by the Fourth, Sixth and Twelfth Avenue interchanges on I-405.
7. **South Waterfront/Ross Island Bridge:** continued refinement of zoning in the South Waterfront area is expected as the market matures for this district. The area falls within the half-mile radius of the Macadam interchange on I-5.

Potential Impacts of Proposed TPR Amendment
in the Metro Region

Current Zoning within 1/2 mile
of Highway Interchanges

Zoning

Commercial

Industrial

Mixed Use

Multi Family

Single Family

Rural Residential

Open Spaces

UGB

Metro boundary

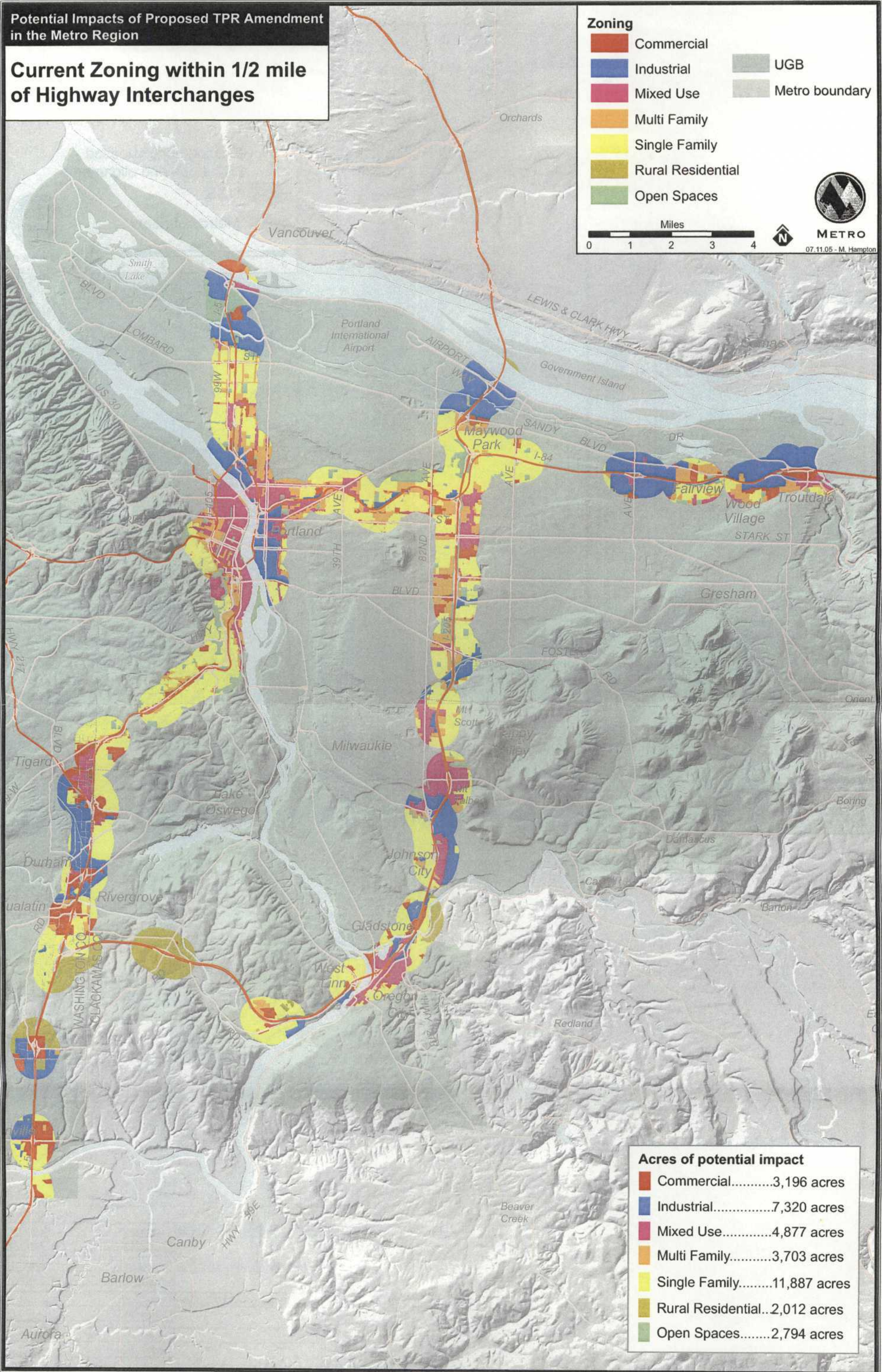
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METRO

07.11.05 - M. Hampton



Acres of potential impact	
Commercial.....	3,196 acres
Industrial.....	7,320 acres
Mixed Use.....	4,877 acres
Multi Family.....	3,703 acres
Single Family.....	11,887 acres
Rural Residential..	2,012 acres
Open Spaces.....	2,794 acres

Potential Impacts of Proposed TPR Amendment
in the Metro Region

Taxlots and 2040 Design Types within
1/2 mile of Highway Interchanges

Potentially impacted taxlots (PITs)
(1/2 mile from highway interchange)

PITs in 2040 Centers

PITs in Station Communities

Existing and Proposed
LRT stops and alignments

UGB

Metro boundary

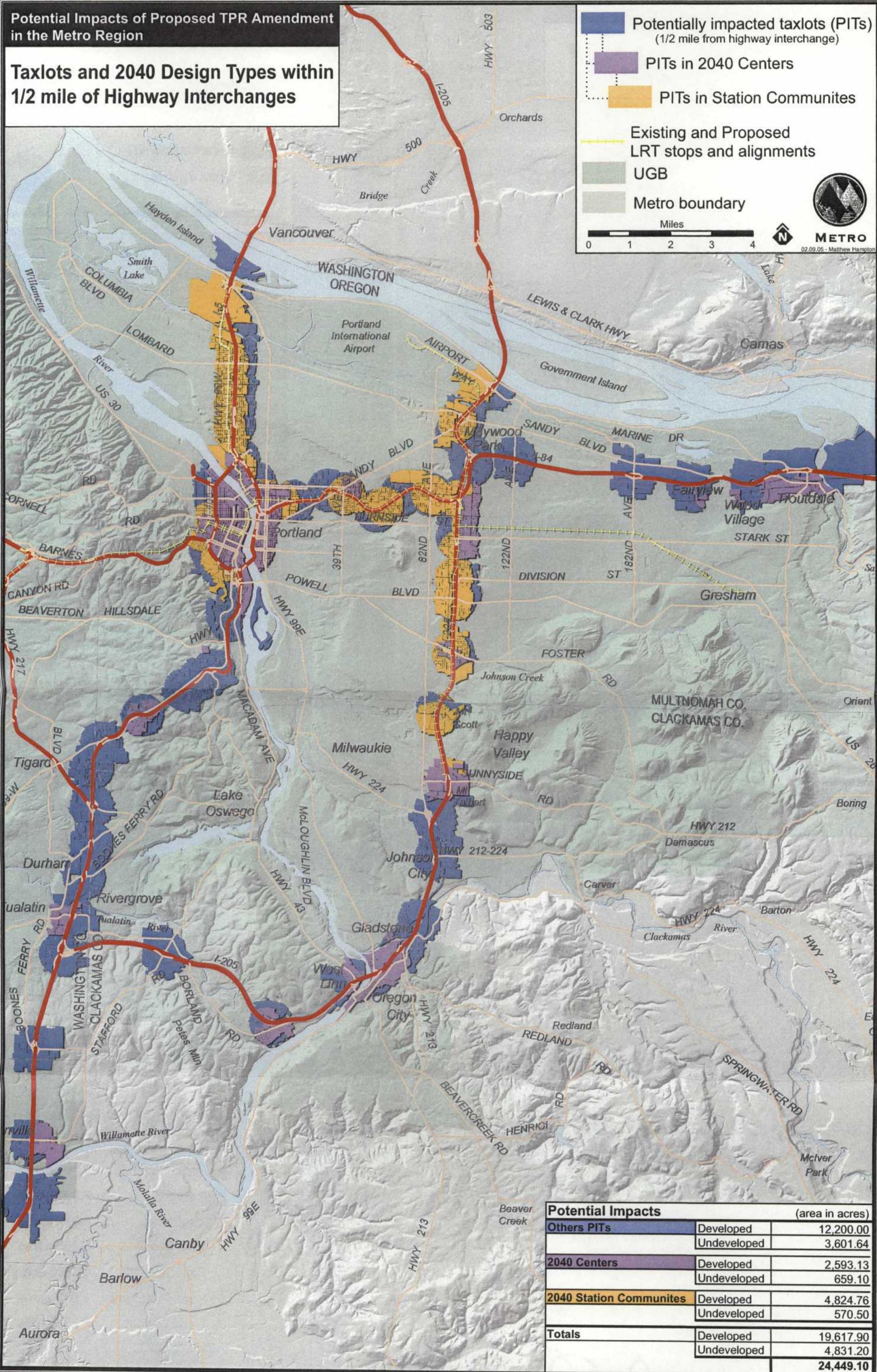
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METRO

02.09.05 - Matthew Hampton



Potential Impacts			(area in acres)
Others PITs	Developed		12,200.00
	Undeveloped		3,601.64
2040 Centers	Developed		2,593.13
	Undeveloped		659.10
2040 Station Communities	Developed		4,824.76
	Undeveloped		570.50
Totals	Developed		19,617.90
	Undeveloped		4,831.20
			24,449.10



METRO

DRAFT

July 15, 2005

Oregon Transportation Commission
355 Capitol Street NE, Room 126A
Salem, OR 97301

Chair Foster and Oregon Transportation Commission Members:

On behalf of the Metro Council and the Joint Policy Advisory Committee on Transportation (JPACT), we want to thank you for the opportunity to comment on the project eligibility criteria and prioritization factors for the 2008-11 State Transportation Improvement Program.

Metro has been successfully working with the ODOT Region 1 management and staff to improve the STIP project selection process and coordinate it with project selection of the Metropolitan TIP. We would like to see the eligibility criteria and prioritization factors, or other STIP documentation, address these issues that we have been addressing locally so that Region 1 staff is supported in their efforts with written policy direction. In addition, we understand that some of the comments are intended for the overall STIP criteria and process and some are intended for the implementation of this process by Region 1.

1. ODOT should do everything it can to increase transparency of the project selection process. Types of projects eligible for each category of available funds should be clearly defined, the pool of eligible projects for each category should be listed, the criteria for selection of projects within each category should be defined, and the application of the criteria to each of the eligible projects leading to the selection of certain projects being recommended should be demonstrated for the draft program for public comment.
2. We would appreciate ODOT opening up the process to the MPOs to participate in selecting which projects will be proposed for funding in the draft program for public comment and in the final project selection after the public comment period. This participation would be consistent with federal selection process guidelines and would utilize the OTC eligibility criteria and prioritization factors.
3. ODOT should provide a written summary of comments received and how the issues raised were addressed in the selection process so that we and other governments and members of the public understand what happened to their comments.

4. In December, the OTC will be approving funding allocation levels for each category of projects. We would like an opportunity to comment to the OTC on the proposed allocations before the final decision.
5. We want to commend Region 1 for providing an early opportunity to evaluate potential preservation projects for deficient pedestrian and bicycle facilities during the 2006-09 STIP update. We encourage the OTC to adopt this as a standard practice for the state to foster creative ways to address all the transportation needs along state facilities. Similarly, ITS add-ons to preservation projects should also be considered and ITS funding reserved for this purpose.
6. The proposed criteria includes a strong emphasis on leveraging local funds. Please be aware that funds at the local level are increasingly scarce, especially in light of the minimal increases in state funding to local governments.
7. With the legislative adoption of the OTIA 3 program, there is a strong emphasis on borrowing and advance use of federal funds. Please provide a reconciliation of the level of Modernization and Bridge funding that was previously expected to be available for the STIP period and what remains after borrowing, including the local portion of the bridge program.

Again, thank you for the opportunity to comment on the STIP process and project eligibility criteria and prioritization factors. We look forward to working with you and ODOT staff on the 2008-11 STIP process.

Sincerely,

David Bragdon
Metro Council President

Rex Burkholder
JPACT Chair

Cc: Matthew Garrett, Region 1 Manager

STATE OF OREGON

MEMORANDUM

Department of Transportation
Transportation Development Division
Mill Creek Office Park
555 13th Street NE, Suite 2
Salem, Oregon 97301-4178
(503) 986-4121 FAX (503) 986-4174

Date: May 27, 2005

TO: Interested Stakeholders

CC: STIP Stakeholder Committee members, Region STIP Coordinators

FROM: Jerri Bohard, ODOT TDD Planning Section Manager

SUBJECT: Draft 2008-2011 STIP Project Criteria

Attached for your review are the draft Eligibility Criteria and Prioritization Factors for the 2008-2011 STIP. We would appreciate receiving your comments and suggestions *by July 15, 2005*. The STIP Stakeholder Committee met on May 19 to develop this draft of the 2008-2011 Criteria. The Committee supported the changes proposed by staff and identified some additional updates.

While the criteria are not substantially re-written from the adopted 2006-2009 version, proposed changes are highlighted below:

- "Projects that support freight mobility" was added to the Prioritization Factors (on page 2) for C-STIP MOD with footnote #9 (on page 12). The footnote language draws on the Freight Advisory Committee's criteria for OTIA III projects.
- "Projects that best support the policies of the Oregon Highway Plan" was added to the Prioritization Factors for Bridge (on page 2), with footnote #18 (on page 16). This clarifies that Bridge projects should also support the OHP policies.
- On page 5, the MPO TMA paragraph (beginning on line 7) will be updated to reflect current federal and MPO terminology.
- A sentence on page 8, line 50 was dropped for clarity.
- "Would facilitate public and private investment that creates or sustains jobs" has been added as an example of possible leverage and public

benefit to the footnotes for D-STIP and C-STIP MOD projects (page 10 & page 13).

- Since the OHP has been amended, the reference to the 1999 OHP on page 11 has been updated to reference only the OHP, without a year specified.
- The Bridge section of the footnotes (pages 15 and 16) has been updated to more accurately reflect current practice.
- Table 1 on page 18 has a column added to show OHP policies that may apply to Bridge projects.
- Appendix A on page 19 has a note added referencing the forthcoming STIP Users' Guide that will be available on ODOT's website and will provide more information on each of the programs and their decision processes.

Please review the attached draft Eligibility Criteria and Prioritization Factors and send any comments or suggestions to lucia.l.ramirez@odot.state.or.us by July 15, 2005. If you have any questions, please call either Lucia Ramirez at 503-986-4168 or Jerri Bohard at 503-986-4165. The STIP Stakeholder Committee will meet again in early August to finalize the recommended criteria and forward a final draft to the OTC for adoption.

Attachment:

Draft 2008-2011 STIP Eligibility Criteria and Prioritization Factors

**Project Eligibility Criteria and Prioritization Factors
For the 2008-2011 Development STIP and Construction STIP
Process Overview
Eligibility Criteria**

Development STIP Major projects	Modernization projects	Construction STIP Preservation projects	Construction STIP Bridge replacement/rehabilitation projects
<p>Development work on major projects may be eligible for funding if it:</p> <ul style="list-style-type: none"> Supports the definition of "Development STIP" approved by the Oregon Transportation Commission Addresses an unmet transportation need in the applicable acknowledged transportation system plan(s) (TSP) or, in the absence of an applicable acknowledged TSP(s), the applicable acknowledged comprehensive plan and any applicable adopted TSP(s), or Addresses project need, mode, function and general location for a transportation need identified in an acknowledged TSP. or Is identified as a project of statewide significance or as a federal discretionary project. Has funding adequate to complete the identified milestone.¹ 	<p>Modernization projects may be eligible for funding if they:</p> <ul style="list-style-type: none"> Are consistent with the applicable acknowledged transportation system plan (TSP) or, in the absence of an applicable acknowledged TSP, the applicable acknowledged comprehensive plan and any applicable adopted TSP.⁵ Are consistent with the Oregon Highway Plan policy on Major Improvements (Policy 1G, Action 1.G.1), where applicable.⁶ 	<p>Pavement Preservation projects may be eligible for funding if they:</p> <ul style="list-style-type: none"> Are identified through the Pavement Management System process.¹² 	<p>Bridge replacement and rehabilitation projects may be eligible for funding if they:</p> <ul style="list-style-type: none"> Are identified through the Bridge Management System process.¹⁶ Are improvements or work needed to rebuild or extend the service life of existing bridges and structures (includes replacement of an existing bridge).

¹ To the extent that legislative action (e.g., HB 2041) applies, the criteria in the legislation will control in the event of a conflict.

Prioritization Factors
Used to Select Projects for Funding from the Pool of Eligible Projects

Development STIP Major projects	Modernization Projects	Construction STIP Preservation projects	Bridge replacement/rehabilitation projects
<p>Priority shall be given to:</p> <ul style="list-style-type: none"> ♦ D-STIP project suitability (an assessment of the level of work completed to achieve the planned D-STIP milestone). ♦ Projects that best support the policies of the Oregon Highway Plan.² ♦ Projects that have already completed one or more D-STIP milestones. ♦ Projects that have funding identified for development or construction³ ♦ Major Modernization Projects that leverage other funds and public benefits.⁴ 	<p>Priority shall be given to:</p> <ul style="list-style-type: none"> ♦ Project readiness (an assessment of the likelihood of a project getting to construction in the timeframe contemplated).⁷ ♦ Projects that best support the policies of the Oregon Highway Plan.⁸ ♦ Projects that support freight mobility⁹ ♦ Projects that leverage other funds and public benefits.¹⁰ ♦ Class 1 and 3 projects that have completed an environmental milestone of a Record of Decision (ROD) or Finding of No Significant Impact (FONSI) (see footnote for Class 2 projects)¹¹ 	<p>Priority shall be given to:</p> <ul style="list-style-type: none"> ♦ Project readiness (an assessment of the likelihood of a project getting to construction in the timeframe contemplated).¹³ ♦ Projects that best support the policies of the Oregon Highway Plan.¹⁴ ♦ Projects that leverage other funds and public benefits.¹⁵ 	<p>Priority shall be given to:</p> <ul style="list-style-type: none"> ♦ Projects that support the approved Bridge Options Report. (This prioritization factor is not intended to limit bridge projects to those identified in the Bridge Options Report, but to give priority to those identified in the report.)¹⁷ ♦ Projects that best support the policies of the Oregon Highway Plan.¹⁸ ♦ Projects that leverage other funds and public benefits.¹⁹

Project Eligibility Criteria and Prioritization Factors
Process Description and Guidance
For the 2008-2011 Development STIP and Construction STIP

I. Introduction

The Oregon Transportation Commission (OTC) approved the Project Eligibility Criteria and Prioritization Factors to assist Area Commissions on Transportation (ACTs), Metropolitan Planning Organizations (MPOs), or regional or statewide advisory groups advising the OTC on the selection of Statewide Transportation Improvement Program (STIP) projects. The document gives basic definitions and funding information and provides guidance pertaining to roles and responsibilities, project selection and documentation. More information about the ACT process, advisory committees, Oregon transportation management systems, other STIP programs and funding is available on the Internet (see Appendix A).

The OTC establishes program goals, funding levels and regional funding distribution at the start of each two-year STIP update. These policy decisions are made separate from these eligibility criteria and prioritization factors and are not part of this document. (See Appendix B for the decision-making process.)

A. Roles and Responsibilities

The OTC will make the final selections for all projects included in the STIP. The Commission will consider the advice and recommendations that it receives from ACTs, MPOs and regional or statewide advisory groups. ODOT will provide tools necessary to enable an ACT to carry out its responsibilities under these criteria. Geographic areas that do not have an ACT must adhere to the same standards of accountability as ACTs (*Policy on Formation and Operation of the Area Commissions on Transportation*, Section VI, Basis for Decision Making) and demonstrate to the OTC that recommendations were developed in accordance with these criteria and factors. In making final project selections, the OTC will ensure that ACTs, MPOs and regional or statewide advisory groups have based their considerations on the criteria and will ensure projects are distributed according to the funding allocations approved by the OTC for the 2008–2011 STIP.

In making decisions, the OTC applies both regional and statewide perspective, optimizes system effectiveness in decisions for the state system and strives to develop and operate an integrated intermodal transportation system that facilitates the safe, efficient and economic movement of people and goods. (*Policy on Formation and Operation of the Area Commissions on Transportation*, Section III. Authority)

B. Definitions

STIP includes both the Development and Construction sections of the Statewide Transportation Improvement Program. The D-STIP houses projects that require more than 4 years to develop or for which construction funding needs to be obtained. Projects that can complete the development process and be ready for bid within 4 years or less may be placed directly into the C-STIP.

Development STIP (D-STIP)

The Oregon Transportation Commission approved the following definition for the D-STIP:

Projects approved and funded for development through specific milestones and within specific timeframes, which include the following characteristics:

- A. *Projects approved for funding through specific milestones such as National Environmental Policy Act (NEPA) design-level environmental documents, right of way acquisition, and final plans; or*
- B. *Projects for which needed improvements have been identified but a final solution either has not been determined or needs further design and analysis.*

The types of projects that tend to have one or more of the above characteristics include large statewide significant projects, federally earmarked or demonstration projects, modernization or major bridge replacement projects, and discretionary projects (projects eligible to receive federal discretionary funds).

Construction STIP (C-STIP)

The C-STIP identifies project scheduling and funding for the state's transportation preservation and capital improvement program for a four-year construction period. This program meets the requirements of the Transportation Equity Act for the 21st Century (TEA-21), the federal act that provides funds to states for transportation projects. For application of these criteria and prioritization factors, C-STIP means Modernization, Preservation and Bridge projects.

Other STIP Programs

Other STIP programs (examples include Safety, Bicycle/Pedestrian, Transit, Congestion Mitigation/Air Quality Improvement, Transportation Enhancement, and Scenic Byways) are not addressed in this document. More information about programs funded in the STIP is available in the *Draft 2006-2009 STIP*.

C. Project Selection

Eligibility Criteria and Prioritization Factors have been developed for both the Development STIP (D-STIP) and the Construction STIP (C-STIP). ACTs, MPOs and others, including those where an ACT does not exist, shall apply both regional and statewide perspectives in making their recommendations. The Commission anticipates that most projects considered by ACTs, MPOs and regional or statewide advisory groups would be the outcomes of planning and the transportation management systems maintained by ODOT. ODOT Region staff shall assist the ACT in developing recommendations as described in the *Policy on Formation and Operation of the ACTs*, Section II. D, Role of ODOT Staff.

ACTs, MPOs and regional or statewide advisory groups should use this document as a guide when they evaluate projects for the STIP on the state highway system and for off-system projects that support implementation of the Oregon Highway Plan (OHP). Projects recommended for funding in the STIP should have consistent application of the project eligibility criteria and prioritizing factors. ACTs, MPOs and regional or statewide advisory groups may use additional criteria to select and rank projects provided the criteria are consistent with the

1 project eligibility criteria and prioritization factors adopted by the OTC. If requested, ODOT staff
2 will provide a model to assist with project ranking. This process recognizes regional differences
3 and is consistent with the *Oregon Transportation Plan* (Policy 2G) and the *Policy on Formation*
4 *and Operation of the Area Commissions on Transportation*, Section VI, Basis for
5 Decisionmaking.

6
7 **In MPO areas designated as Transportation Management Areas (TMA)**, all projects using
8 federal title 23 or Federal Transit Act funds, except projects on the NHS and projects funded
9 under the Bridge, Interstate Maintenance and Federal Lands Highways programs, shall be
10 selected by the MPO in consultation with the State and transit operator from the approved
11 metropolitan Transportation Improvement Program (TIP). Projects on the NHS and projects
12 funded under the Bridge and Interstate Maintenance programs shall be selected by the State, in
13 cooperation with the MPO, from the approved metropolitan TIP. *Note: This paragraph will be*
14 *rewritten to make its language consistent with that used in federal regulations. The intent of the*
15 *paragraph will not change.*

16
17 **In MPO areas not designated as TMAs**, projects using federal title 23 or Federal Transit Act
18 funds, other than Federal Lands Highways program funds, shall be selected by the State and/or
19 the transit operator, in cooperation with the MPO, from the approved metropolitan TIP.

20
21 **Outside MPO areas**, transportation projects undertaken on the NHS and projects funded under
22 the Bridge and Interstate Maintenance programs will be selected by the State in consultation
23 with the affected local officials. Other transportation projects undertaken with funds
24 administered by FHWA, other than federal lands highway projects, shall be selected by the
25 State in cooperation with the affected local officials and projects undertaken with Federal Transit
26 Act funds shall be selected by the State in cooperation with the appropriate affected local
27 officials and transit operators (23 Code of Federal Regulations part 450).

28
29 ACTs and MPOs should coordinate their efforts to assure a better decision making process
30 which results in better coordination of projects. When ACT and MPO boundaries overlap, a
31 higher level of clearly defined coordination is needed. Where this occurs, the MPO and ACT
32 should jointly agree on a process for maintaining consistency between ACT recommendations
33 and the MPO Plan and TIP (*Policy on Formation and Operation of the Area Commissions on*
34 *Transportation*, Section VII. G, Coordination).

35 36 Project Eligibility Criteria

37
38 ACTs, MPOs, or regional or statewide advisory groups advising the OTC on the selection of
39 STIP projects for funding on the state highway system or for off-system projects that support
40 implementation of the OHP shall apply the project eligibility criteria. The project eligibility criteria
41 are a first screen so that additional efforts can be focused to determine which projects they will
42 evaluate further for funding. The eligibility criteria are not listed in any particular order. Projects
43 must satisfy these criteria, at a minimum, before they are given further consideration.

44 45 Prioritization Factors

46
47 The prioritization factors are to be used to ensure consistent consideration of the relative merits
48 of projects by ACTs, MPOs and regional or statewide advisory groups. With the exception of
49 project readiness which shall have greater weight, the prioritization factors are not listed in any
50 particular order and do not have any implied weight. To provide for regional differences, ACTs,
51 MPOs and regional or statewide advisory groups may use additional factors to rank projects

provided the factors are consistent with the factors adopted by the OTC. If an ACT, MPO or regional or statewide advisory group chooses to use additional prioritization factors, they must inform those developing project proposals about the factors prior to the beginning of the project submittal period. When developing a tool to evaluate OHP policies, OHP Appendix A2 provides definitional information to facilitate shared understanding of the goals, policies and actions of the OHP policy element.

D. Project Documentation

ACTs, MPOs and regional or statewide advisory groups making recommendations to the OTC shall document the analysis used to develop recommendations. The supporting information should include the following:

1. Project description
2. Project justification
 - ♦ Identify the planning history
 - ♦ As applicable, describe information provided from the pavements or bridge management system. If the recommendation varies from the prioritization identified by the management system, describe the process used to reach that recommendation.
 - ♦ Describe how this project supports OHP policies (Table 1).
 - ♦ Provide an assessment of the likelihood of the project getting to construction in the timeframe contemplated
 - ♦ Provide supplementary project information if the project leverages additional funding or community benefit
3. Applicable additional information

E. Funding

As required by federal regulations (23 CFR Part 450) the C-STIP is financially constrained by year. The Eligibility Criteria and Prioritization Factors defined in this document apply to projects that implement current revenue sources. If more funding becomes available, it will be allocated in adherence to any additional funding or selection criteria attached to those new funds.

The STIP represents multiple funding categories and each category has limits as to how the funding can be obligated. STIP projects must meet the funding source limitations established by state or federal regulations and cannot be selected without looking at those limitations. The D-STIP will be funded with the same funding sources as the C-STIP and the total funds committed to the D-STIP may vary. Funding of the D-STIP can be impacted by several factors, including the following: OTC selection of projects of statewide importance, federally funded earmarks and discretionary projects, federal and state restrictions on the use of available funds, and the Regional equity distribution of Modernization funds (ORS 366.507).

II. Development STIP (D-STIP)

A. Introduction to the D-STIP

The Oregon Transportation Commission will make the final selections for all D-STIP projects and will apply a statewide perspective to the proposed list of projects, giving highest priority to OTC approved federal discretionary projects that have funding secured through federal legislation.

It will be important to clearly articulate the rationale and need of a D-STIP project in order to help manage expectations and potential next steps. D-STIP projects will be consistent with statewide policies and may be identified in one or more planning documents, such as transportation system plans, regional transportation plans, corridor plans, comprehensive plans, refinement plans or state management systems. Additionally, the OTC may select large projects of statewide significance for inclusion in the D-STIP. The D-STIP includes projects approved and funded for development through specific milestones for planning, environmental or project development activities and within specific timeframes.

The following should be considered when applying the Eligibility Criteria and Prioritization Factors:

- ♦ A new alignment will be selected for one or several features in the refinement plan. Project specific refinement plans may be funded in the D-STIP as needed to resolve need, function, mode and general location decisions that could not be made during system plan or corridor plan development. In circumstances where these decisions have already been made, the goal of refinement planning will be to develop a specific solution or a range of solutions to the problems(s) that support the next appropriate project development step.
- ♦ Rapid development is occurring in the area, making corridor preservation critical.
- ♦ Issues needing resolution have a high priority and solutions are likely to be funded in the near future.
- ♦ The highway segment is very sensitive environmentally, and a strategy for the whole segment needs to be approved before work on individual elements can commence. For example, addressing land use to help resolve inconsistencies with planned transportation facilities; planning for compatible land uses along state highways.
- ♦ Public pressure for a sustainable decision is high.

Selection of D-STIP projects requires application of the D-STIP definition approved by the OTC. D-STIP projects generally fall into the following three categories: federal discretionary projects (earmarks), large statewide significant projects, and modernization or major bridge replacement projects.

Federal discretionary projects

Federal discretionary projects are a part of federal appropriations or transportation funding legislation. The Oregon Department of Transportation, with direction from the Oregon Transportation Commission, developed guidelines to use in deciding which projects should be submitted as earmark proposals in federal legislation for the reauthorization of transportation funding. The projects are categorized as low or medium risk and can be completed over the life of the federal transportation funding bill. Local jurisdictions that pursue earmark funding for

projects not submitted by ODOT are solely responsible for the required matching funds or any shortfalls.

Large statewide significant projects

Large statewide significant projects are projects that require funding that cannot be achieved within standard STIP allocations but are viewed by the OTC as projects of statewide significance and can be selected by the OTC independent of the ACT process. Identified funds would be used to either keep existing work on very large projects current, or to support development of very large projects (for example, funding a new Environmental Impact Statement or updating an existing EIS).

Modernization or major bridge replacement projects

Modernization or major bridge replacement projects are projects that have been approved and funded for development through specific milestones but that cannot be constructed within the four-year timeframe of the STIP and/or within the normal Region STIP allocations. These may include shelf projects, which are high priority projects developed in anticipation of funding but that have no funding identified for construction in the current STIP. Milestones include planning, environmental and project development.

D-STIP Project Completion

Projects remain in the D-STIP until work required to meet the National Environmental Policy Act (NEPA) is completed. NEPA classifications:

- ♦ Class 1: Requires draft and final environmental impact statement (EIS). An EIS is required for actions that significantly affect the environment.
- ♦ Class 2: Categorical exclusion (neither an environmental assessment nor an environmental impact statement is required). These actions do not individually or cumulative have a significant environmental effect and are excluded from the requirement to prepare an environmental assessment or environmental impact statement.
- ♦ Class 3: Requires environmental assessment (EA) or revised environmental assessment. The environmental impact is not clearly established. All actions that are not Class 1 or 2 fall into this classification. These actions require preparation of an EA to determine the appropriate environmental document. If it is determined that the action is likely to have a significant impact on the environment, the preparation of an EIS will be required.

All Class 1 and 3 projects should be in the D-STIP until a final Record of Decision (ROD) or Finding of No Significant Impact (FONSI) has been completed. By programming completion of D-STIP milestones that follow a ROD or FONSI, the project delivery activity can continue through right of way acquisition, advance plans, and/or plans specifications and estimates (PS&E). The project could then be ready for inclusion in the C-STIP at the regular 2-year update. Work on right of way, advance plans or PS&E may be conducted in either the D-STIP or the C-STIP.

ODOT and the Department of Land Conservation and Development (DLCD) shall work with affected cities and counties to obtain land use approvals needed to select a specific alignment. The level of land use consistency required will depend on the environmental milestone being completed.

Although the primary purpose of the D-STIP is to develop projects for the C-STIP, inclusion in the D-STIP does not guarantee funding for future D-STIP milestones or that a project will automatically move into the C-STIP. Funding may not be available to construct the final solution or the environmental document may identify the solution as a "No Build".

B. Development STIP

B. 1. Development STIP Eligibility Criteria Footnotes

¹D-STIP milestones

D-STIP projects must have funding to complete the identified milestone; partial milestones or those with no funding will not be programmed. D-STIP milestones, while not necessarily sequential, include those listed below. Not all projects are required to complete all the milestones.

- ♦ Project specific refinement plan completion
- ♦ Project specific refinement plan adoption
- ♦ Land use consistency/Statewide Goal Compliance. (Project is included in the acknowledged comprehensive plan or transportation system plan as a planned facility, which is a facility allowed by the plan and that is expected to be constructed within the next 20 years with available financial resources. This may include land use decisions that establish need, mode, function and general location.)
- ♦ Location Environmental Impact Statement (EIS) Record of Decision (ROD)
- ♦ Design EIS ROD
- ♦ Environmental Assessment (EA) and Finding of No Significant Impact (FONSI)
- ♦ Right of way acquisition
- ♦ Advance plans (or any other applicable project development design milestone)
- ♦ Plans, specifications and estimates (PS&E)

B.2. Development STIP Prioritization Factors Footnotes

²D-STIP Projects that Best Support the Oregon Highway Plan Policies

Oregon Highway Plan policies that are applicable to D-STIP projects may include but are not necessarily limited to the following (Table 1):

- ♦ 1A, 1B, 1C, 1D, 1F, 1G, 1H, 2A, 2B, 2C, 2E, 2F, 2G, 3A, 3B, 3C, 4A, 4B, 4C, 4D, 4E, and 5A

³Funding for D-STIP Projects

A funding scenario should be identified through construction, though not necessarily guaranteed. Congressional high priority projects would fall into this category.

⁴Leverage and Public Benefit for D-STIP Projects

ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects leverage additional funding or collateral community benefits and make wise and efficient use of infrastructure and natural resources. Those making project recommendations should pursue an agenda to accomplish leverage or community benefits although specific benefits might not always be known at the D-STIP stage. Examples of leverage and public benefits for D-STIP modernization projects could include where applicable, but are not limited to the following:

- ♦ Other funding contributions, such as additional federal funds, local matching funds or provision of project right of way, private funding.
- ♦ Bundling with other infrastructure projects (provided there is no adverse affect on project readiness).
- ♦ Fish enhancement, such as culvert replacement and improved drainage.
- ♦ Transfer of jurisdiction from state to local control.
- ♦ Leveraging additional funds that contribute to transportation system effectiveness, revitalization of the downtown or mainstreet, etc.
- ♦ Direct benefits to multiple modes of travel. This would include local efforts to accommodate non-auto modal opportunities.
- ♦ Local circulation improvements that support and complement the state highway project.
- ♦ Improvements in Oregon's economy by addressing transportation challenges.
- ♦ Potential for collecting toll revenues.
- ♦ Projects that implement other innovative finance techniques.
- ♦ Would facilitate public and private investment that creates or sustains jobs

This determination must be considered within the capacity of the community on a case by case basis.

III. Construction STIP (C-STIP)

A. Introduction to the C-STIP

The C-STIP contains projects scheduled for construction and is financially constrained by year. Application of the C-STIP Eligibility Criteria and Prioritization Factors includes Modernization, Preservation and Bridge projects. Information about other programs in the STIP may be found in the *Draft 2006-2009 STIP*.

B. Modernization

As stated in the *Oregon Highway Plan*, "The primary goal of modernization projects is to add capacity to the highway system in order to facilitate existing traffic and/or accommodate projected traffic growth. Modernization means capacity-adding projects including HOV lanes and off-system improvements. Projects in this category include major widening of lanes or bridges, and the addition of lanes, rest areas or entire facilities." Where a culvert is replaced with a bridge due to environmental analysis concluding that this is necessary, the project is not considered modernization.

B.1. Construction STIP Eligibility Criteria for Modernization Footnotes

⁵Consistency with Comprehensive Plans and Transportation System Plans (TSP)

The proposal must show that the project is consistent with the applicable adopted comprehensive plan or transportation system plan as a planned facility, including land use decisions that establish need, mode, function and general location, including goal exceptions, where required. If consistency cannot be demonstrated the project submission will describe how the inconsistency will be addressed, including changes to the project, TSP and/or comprehensive plan and when they need to be completed. In such cases, the ACT or regional or statewide advisory group may recommend that the project be included in the D-STIP, and request that Transportation Planning Rule issues be addressed.

Proposed projects from within MPOs shall be identified in fiscally constrained Regional Transportation Plans and shall meet air quality conformity requirements.

⁶Consistency with Oregon Highway Plan (OHP) Policy 1G, Action 1G.1, on Major Improvements

In order to demonstrate that a project is consistent with OHP Policy 1G, Action 1G.1, the proposal must show that the project and/or the TSP clearly addressed the prioritization criteria found in Action 1G.1 of the OHP.

Where needed to achieve consistency with the above-noted Oregon Highway Plan policy, the ACTs, MPOs, or regional or statewide advisory groups, with ODOT assistance, shall negotiate conditions for project approval with an applicant. These conditions, if not addressed as the project proceeded through the D-STIP if applicable, shall be attached to the application approved by the ACT, MPO or regional or statewide advisory group, shall be as specific as possible given the stage of development of the project, and may include the following:

- ♦ Access management and interchange area management plans,
- ♦ Highway segment designations,
- ♦ Needed local street improvements,
- ♦ Traffic management plans,

- ♦ Land use plan designations,
- ♦ Other similar conditions.

B.2. Construction STIP Prioritization Factors for Modernization Footnotes

⁷Project Readiness for C-STIP Modernization Projects

Projects that can begin construction within the timeframe of the STIP and within the timeframe expected are considered to be more ready than those that have many or complicated remaining steps. The overall judgement of a project's readiness is dependent on timeliness of construction expectations not on the number of steps to be completed.

Where applicable, the hurdles to accomplish each of the following steps must be assessed for major modernization projects that have come through the D-STIP and for which a final Record of Decision (ROD) for a design level environmental impact statement or a Finding of No Significant Impact (FONSI) has been made:

- ♦ Public involvement
- ♦ Right of way purchased
- ♦ Final construction and traffic flow management plans developed
- ♦ Additional land use requirements such as completing plans for access management, supporting local transportation system improvements and land use measures to protect the function and operation of the project.

Projects that have not gone through the D-STIP or have not completed a FONSI or ROD must also assess the following:

- ♦ Environmental requirements
- ♦ Land use requirements
- ♦ Applicability of minor improvements and alternative mode solutions

For all projects, if those aspects are not completed at the time of the assessment of project readiness, a plan to complete them must be described to assist in judging the likelihood that all of those aspects can be addressed, and construction begun within the timeframe projected. The project budget and time line must include execution of the plan.

⁸Modernization Projects that Best Support the Oregon Highway Plan Policies

OHP policies that are applicable to modernization projects may include but are not necessarily limited to the following (Table 1):

- ♦ 1A, 1B, 1C, 1D, 1F, 1G, 1H, 2A, 2B, 2C, 2E, 2F, 2G, 3A, 3B, 3C, 4A, 4B, 4C, 4D, 4E, and 5A

♦ ⁹ Projects that support freight mobility

Are modernization projects on freight routes of statewide or regional significance, including: highways on the State Highway Freight System as designated in the *Oregon Highway Plan*; or highways or local roads designated as National Highway System intermodal connectors; or other highways with a high volume or percentage of trucks or which are important for regional or interstate freight movements, or local freight routes designated in a regional or local transportation plan. These projects would remove identified barriers to the safe, reliable, and efficient movement of goods and/or would support multimodal freight transportation movements.

1
2
3 ¹⁰**Leverage and Public Benefit for C-STIP Modernization Projects**

4 ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects
5 leverage additional funding or collateral community benefits and make wise and efficient use of
6 infrastructure and natural resources. Examples of leverage and public benefits for C-STIP
7 modernization projects include:
8

- 9
- 10 • Other funding contributions, such as additional federal funds, local matching funds or
11 provision of project right-of-way, private funding.
 - 12 • Bundling with other infrastructure projects (provided there is no adverse affect on
13 project readiness).
 - 14 • Fish enhancement, such as culvert replacement and improved drainage.
 - 15 • Transfer of jurisdiction from state to local control.
 - 16 • Leveraging of additional funds that contribute to transportation system effectiveness,
17 revitalization of the downtown or mainstreet, etc.
 - 18 • Direct benefits to multiple modes of travel. This would include local efforts to
19 accommodate non-auto modal opportunities.
 - 20 • Local circulation improvements that support and complement the state highway
21 project.
 - 22 • Improvements in Oregon's economy by addressing transportation challenges.
 - 23 • Potential for collecting toll revenues.
 - 24 • Projects that implement other innovative finance techniques.
 - 25 • Would facilitate public and private investment that creates or sustains jobs

26 This determination must be considered within the capacity of the community on a case by case
27 basis.
28

29 ¹¹**Environmental Classification**

- 30
- 31 • Class 1: Requires draft and final environmental impact statement (EIS)
 - 32 • Class 2: Categorical exclusion (neither an environmental assessment nor an
33 environmental impact statement is required)
 - 34 • Class 3: Requires environmental assessment (EA) or revised environmental
35 assessment

36 This prioritization factor is not intended to give Class 1 and 3 projects priority over or to exclude
37 Class 2 projects, but to give Class 1 and 3 projects with a completed ROD or FONSI priority
38 over Class 1 and 3 projects that require additional environmental documentation.
39

40 **C. Preservation**

41

42 The pavement preservation projects list is developed by ODOT's Pavement Management
43 System (PMS) and applied by the pavement management selection committees. The PMS is an
44 electronic data management tool used by the department to identify, prioritize and develop
45 needed pavement preservation projects. The role of ACTs, MPOs and regional or statewide
46 advisory groups is to review the timing of the pavement preservation projects as they relate to
47 other local projects or issues; their comments will be considered as part of the process. It is
48 anticipated that these groups will primarily enhance selected projects by leveraging additional
49 funding or collateral community benefit. The interstate preservation projects are selected based
50 on the PMS and a statewide strategy and are therefore not a part of these criteria.
51

C.1. Construction STIP Eligibility Criteria for Pavement Preservation Footnotes

¹²Pavement Strategy

The department has adopted a pavement preservation program designed to keep highways in the best condition at the lowest lifecycle cost, taking into account available funding. ODOT established a Pavement Strategy Committee in 1999 to address pavement preservation issues, including the development of a statewide pavement strategy for all state highways. The pavement strategy was developed using the department's Pavement Management System. The strategy assumes maintenance of existing traffic capacity; it does not provide for capacity improvements.

Using the list generated by the Pavement Management System (PMS), each Region is responsible for recommending preservation projects for inclusion in the STIP.

C.2. Construction STIP Prioritization Factors for Pavement Preservation Footnotes

¹³Project Readiness for C-STIP Preservation Projects

Projects that can begin construction within the timeframe of the STIP and within the timeframe expected are considered to be more ready than those that have many or complicated remaining steps. The overall judgement of a project's readiness is dependent on timeliness of construction expectations not on the number of steps to be completed.

¹⁴Preservation Projects that Best Support the Oregon Highway Plan Policies

Oregon Highway Plan policies that are applicable to preservation projects may include but are not necessarily limited to the following (Table 1):

- ♦ 1A, 1B, 1C, 1D, 1E, 2A, 2C, 2F, 3A, 4A, and 5A

¹⁵Leverage and Public Benefit for C-STIP Preservation Projects

ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects leverage additional funding or collateral community benefits and make wise and efficient use of infrastructure and natural resources. Examples of leverage and public benefits for C-STIP pavement preservation projects include:

- ♦ Other funding contributions, such as additional federal funds, local matching funds or provision of project right-of-way, private funding.
- ♦ Bundling with other infrastructure projects (provided there is no adverse affect on project readiness).
- ♦ Fish enhancement, such as culvert replacement and improved drainage.
- ♦ Transfer of jurisdiction from state to local control.
- ♦ ~~Leveraging of additional funds that contribute to transportation system effectiveness,~~ revitalization of the downtown or mainstreet, etc.
- ♦ Direct benefits to multiple modes of travel. This would include local efforts to accommodate non-auto modal opportunities.
- ♦ Local circulation improvements that support and complement the state highway project.
- ♦ Improvements in Oregon's economy by addressing transportation challenges.

D. Bridge

The process of identifying bridge projects for the STIP is two-fold in nature: (1) bridges are inspected at least every two years in order that the most current inspection information is used to develop a list of bridges; and (2) the use of a Bridge Management System (BMS). The State has implemented the use of PONTIS (bridge management system software) condition evaluation criteria for bridge inspection. Upon full implementation of all the PONTIS modules, the BMS will evaluate the existing condition of bridges, predict the rate of deterioration and suggest repairs and rehabilitation option. For development of the 08-11 STIP, the Bridge Program will continue to use other technical databases to identify bridges that meet twelve separate deficiency parameters. Applying this information, after technical review and coordination with the Regions and the State Bridge Leadership Team, the State Bridge Program Manager recommends a prioritized list of projects for inclusion in the STIP. The role of ACTs, MPOs and regional or statewide advisory groups is to review the timing of the bridge replacement/rehabilitation projects as they relate to other local projects or issues; their comments will be considered as part of the process. It is anticipated that these groups will primarily enhance selected projects by leveraging additional funding or collateral community benefit.

D.1. Construction STIP Eligibility Criteria for Bridge Footnotes

¹⁶Bridge Management System

State Bridge Project Selection

This criterion applies to bridges on the State highway system only. Through an agreement between the State and the Association of Oregon Counties (AOC) and the League of Oregon Cities (LOC), the federal Highway Bridge Replacement and Rehabilitation Project funds are divided between the State and local agencies based on the percentages of deficient bridges. Local bridge projects are covered through a separate selection process.

State bridge projects proposed for funding will be selected based on the desire to maintain and improve transportation's role in Oregon's economy. Traditionally, modernization funding will pay for major improvements to the transportation system including the bridge work. The State Bridge Program will support OTIA, freight mobility, life safety and protection of the transportation infrastructure investment.

Focusing on the Interstate Highway and Oregon Highway Plan Freight Routes, consider bridges as candidates based on the following:

- ♦ Bridges that are presently load restricted or could become restricted in the near future.
- ♦ Bridges that preserve freight corridors, detour and other lifeline routes.
- ♦ Other structural, safety and functional considerations.

D.2. Construction STIP Prioritization Factors for Bridge Footnotes

¹⁷Bridge Options Report

Priority will be given to projects that support the Updated Bridge Options Report adopted by the Oregon Transportation Commission (Add link to BOR)

¹⁸Bridge Projects that Best Support the Oregon Highway Plan Policies

Oregon Highway Plan policies that are applicable to bridge projects may include but are not necessarily limited to the following (Table 1):

- ♦ 1A, 1B, 1C, 1D, 1E, 1F, 1G, 1H, 2A, 2B, 2C, 2F, 2G, 3B, 3C, 4A, 4B, 4C, and 5A

¹⁹Leverage and Public Benefit for C-STIP Bridge Projects

ACTs, MPOs and regional or statewide advisory groups should evaluate how proposed projects leverage additional funding or collateral community benefits and make wise and efficient use of infrastructure and natural resources. Examples of leverage and public benefits for C-STIP bridge replacement/rehabilitation projects include:

- ♦ Other funding contributions, such as additional federal funds, local matching funds or provision of project right-of-way, private funding.

- 1 ♦ Bundling with other infrastructure projects (provided there is no adverse affect on
- 2 project readiness).
- 3 ♦ Fish enhancement, such as culvert replacement and improved drainage.
- 4 ♦ Direct benefits to multiple modes of travel. This would include local efforts to
- 5 accommodate non-auto modal opportunities.
- 6 ♦ Improvements in Oregon's economy by addressing transportation challenges.
- 7
- 8
- 9

Oregon Highway Plan Policies Applicable to Prioritizing Projects Statewide Transportation Improvement Program

Table 1

POLICY	D-STIP MOD.	C-STIP MOD.	C-STIP PRES.	C-STIP Bridge
GOAL 1: SYSTEM DEFINITION				
POLICY 1A: STATE HIGHWAY CLASSIFICATION SYSTEM	X	X	X	X
POLICY 1B: LAND USE AND TRANSPORTATION	X	X	X	X
POLICY 1C: STATE HIGHWAY FREIGHT SYSTEM	X	X	X	X
POLICY 1D: SCENIC BYWAYS	X	X	X	X
POLICY 1E: LIFELINE ROUTES			X	X
POLICY 1F: HIGHWAY MOBILITY STANDARDS	X	X		X
POLICY 1G: MAJOR IMPROVEMENTS	X	X		X
POLICY 1H: BYPASSES	X	X		X
GOAL 2: SYSTEM MANAGEMENT				
POLICY 2A: PARTNERSHIPS	X	X	X	X
POLICY 2B: OFF-SYSTEM IMPROVEMENTS	X	X		X
POLICY 2C: INTERJURISDICTIONAL TRANSFERS	X	X	X	X
POLICY 2E: INTELLIGENT TRANSPORTATION SYSTEMS	X	X		
POLICY 2F: TRAFFIC SAFETY	X	X	X	X
POLICY 2G: RAIL AND HIGHWAY COMPATIBILITY	X	X		X
GOAL 3: ACCESS MANAGEMENT				
POLICY 3A: CLASSIFICATION AND SPACING STANDARDS	X	X	X	
POLICY 3B: MEDIANS	X	X		X
POLICY 3C: INTERCHANGE ACCESS MANAGEMENT AREAS	X	X		X
GOAL 4: TRAVEL ALTERNATIVES				
POLICY 4A: EFFICIENCY OF FREIGHT MOVEMENT	X	X	X	X
POLICY 4B: ALTERNATIVE PASSENGER MODES	X	X		X
POLICY 4C: HIGH-OCCUPANCY VEHICLE (HOV) FACILITIES	X	X		X
POLICY 4D: TRANSPORTATION DEMAND MANAGEMENT	X	X		
POLICY 4E: PARK-AND-RIDE FACILITIES	X	X		
GOAL 5: ENVIRONMENTAL AND SCENIC RESOURCES				
POLICY 5A: ENVIRONMENTAL RESOURCES	X	X	X	X

Appendix A

Key Website Addresses

Draft and Final STIP, Criteria Compliance Reports: <http://www.odot.state.or.us/stip/>

STIP Users' Guide discussing STIP development rules, programs, timelines, and more will be available on ODOT's website in late 2005.

Management Systems: <http://intranet.odot.state.or.us/otms/>

Policy on Formation and Operation of the ACTs:
http://www.oregon.gov/ODOT/COMM/act_main.shtml

Program Advisory Committees, Community Involvement: <http://www.oregon.gov/ODOT/>

2008-2011 STIP DEVELOPMENT TIMELINE

2006-2008 STIP in place

CALENDAR YEAR	FEDERAL FISCAL YEAR	STATE FISCAL YEAR	2006	2007	2008	2009	2010	2011
Jan 2005								
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STIP = Statewide Transportation Improvement Program
 OTC = Oregon Transportation Commission
 ACT = Area Commission on Transportation
 ODOT = Oregon Department of Transportation
 DOT = Department of Transportation
 RCST = Regional Community Solutions Team
 MPO = Metropolitan Planning Organization



Oregon

Theodore R. Kulongoski, Governor

Department of Transportation

Region 1

123 NW Flanders Street

Portland, OR, 97209-4037

(503) 731-8200

(503) 731-8531

July 12, 2005

File Code:

RE: Workforce Development Plan Meeting on July 19th

Dear Colleague,

I am writing to invite you to a meeting on Tuesday, July 19th to introduce ODOT's new Workforce Development Plan. The Plan calls for the formation of an alliance in the Clackamas, Multnomah and Washington counties to improve the participation of women and minorities on state and federally funded transportation construction projects. Your participation in the alliance will be a key to its success.

Direction from the 2003 Legislature and the long-range capacity needs of the construction trades require ODOT to ensure that a qualified and diverse workforce is available for today's and tomorrow's transportation projects. This undertaking cannot happen in isolation, rather it requires partnership with others including: contractors, labor unions, workforce development entities, construction trades training programs, community colleges, community based organizations, educators, and state and local governments. To implement the Workforce Development Plan ODOT is seeking to collaborate with others in the public, private and non-profit sectors with similar interests in the development of a qualified and diverse construction trades workforce. We are looking for opportunities to leverage our common interests to create a system of sustainability for those entering the construction trades.

The July 19th meeting will be held from 1:30 – 3:00 p.m. at the Oregon Association of Minority Entrepreneurs, 4134 N Vancouver in Portland. An overview of ODOT's Workforce Development Plan is provided in the attached fact sheet. The Plan will be placed on ODOT's website and can be accessed at: http://www.oregon.gov/ODOT/HWY/OTIA/bridge_delivery.shtml. Scroll down to the Diversity section to find the Plan.

Please share this invitation with others that you think may be interested in the Workforce Development Plan and the tri-county workforce alliance. I look forward to seeing you on July 19th, to begin the process of working together.

Sincerely,

Matthew L. Garrett
Region 1 Manager

Overview

ODOT's Workforce Development Plan

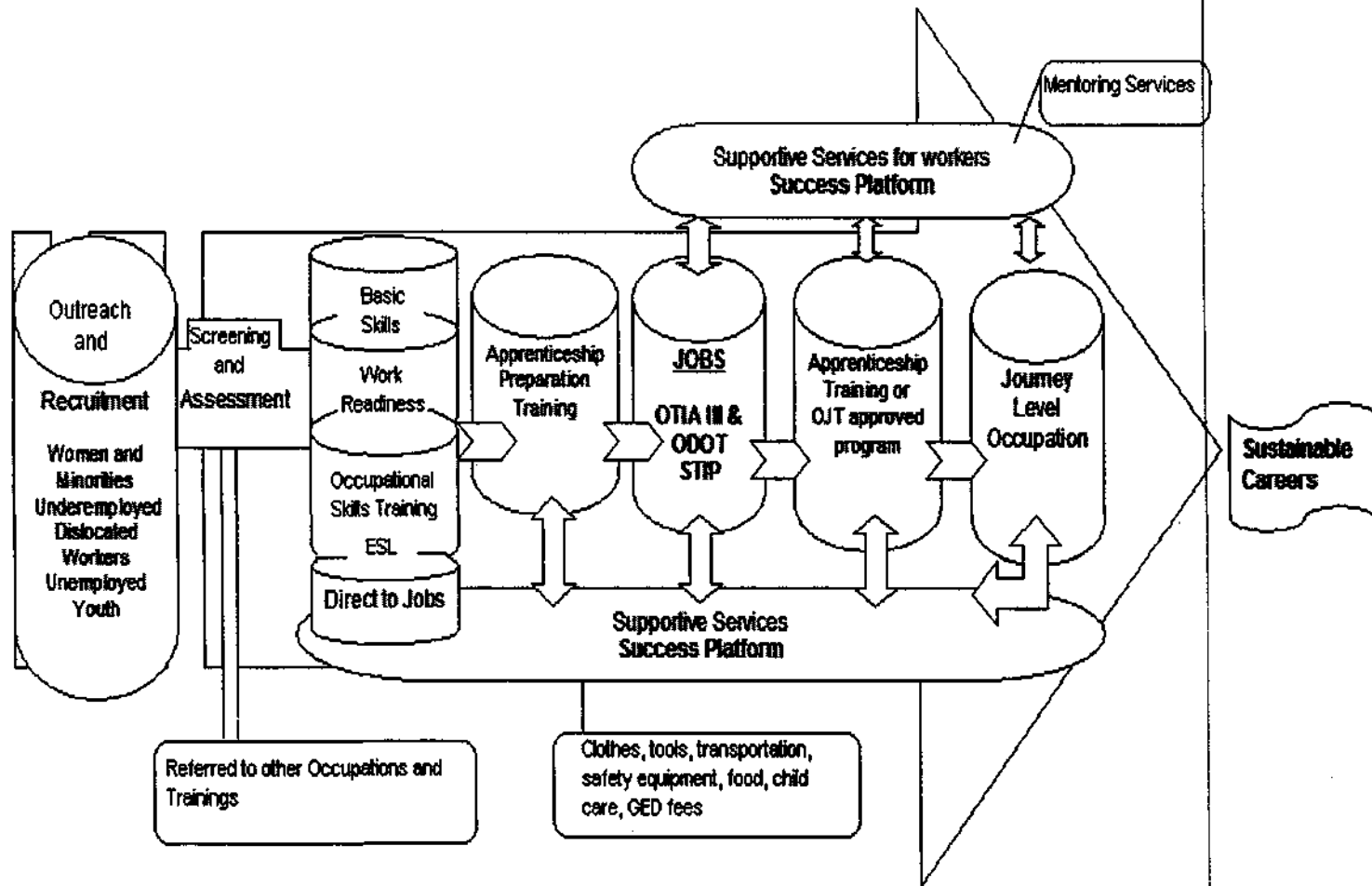
July 1, 2005

- The mission of the Workforce Development Plan is to create and support a qualified and diverse workforce labor pool and increase the use of apprentices to build Oregon's transportation infrastructure.
- Implementation of the Workforce Development Plan will occur through a system of Regional Workforce Alliances. The goal of the alliances is to create a system to recruit, train, place, and retain skilled women and minorities in the construction trades.
- Partners in the alliances will include: the Bureau of Labor and Industries' Apprenticeship and Training Division, Oregon Employment Department, Joint Apprenticeship Training Committees, local government, construction contractors, local Workforce Investment Board or Title 1B providers, local community colleges, tribal representatives, community-based organizations, minority and women chambers and organizations, community leaders and ODOT.
- Instead of developing entirely new systems to build a qualified and diverse labor pool, the plan maximizes the use of existing programs.
- To fund elements of the plan, ODOT will use existing federal funds and apply for new funds. Existing funds are from the Federal Highway Administration, the U.S. Department of Labor, the Bureau of Labor and Industries, Oregon Employment Department, and the Department of Community Colleges and Workforce Development. ODOT will apply for additional funding from federal and state sources.
- There are three critical aspects to the Workforce Development Plan:
 1. Apprenticeship: ODOT will incrementally increase apprenticeship targets from 5 percent to 20 percent over 18 months with annual program reviews and adjustments, as necessary.
 2. Participation of women and minorities on transportation construction projects: Overall, ODOT is seeking to increase participation rates statewide to 14 percent for women and 14 percent for minorities. In the Portland tri-county area, ODOT is seeking to increase participation rates to 14 percent for women and 20 percent for minorities.
 3. Supply side delivery of qualified workers to the industry: Working through the Regional Alliances, ODOT and its partners will ensure the delivery of a qualified and diverse labor pool to meet the labor needs on subject transportation construction projects.

All three lead to achieving the goal of increasing the participation of women and minorities on state and federally funded transportation construction projects and the creation of career paths.

- The Workforce Development Plan will be reviewed on an annual basis for performance and improvement. ODOT will seek input from partners around the state to make changes to the plan. Evaluation of the Plan will focus on two outcomes: 1) the apprenticeship and training system capacity and 2) the development of a qualified labor pool.

Both outcomes will address two central questions: 1) how successful we were in increasing the number of women and minorities in the contracted workforce; and 2) how successful we were in expanding the use of apprentices.



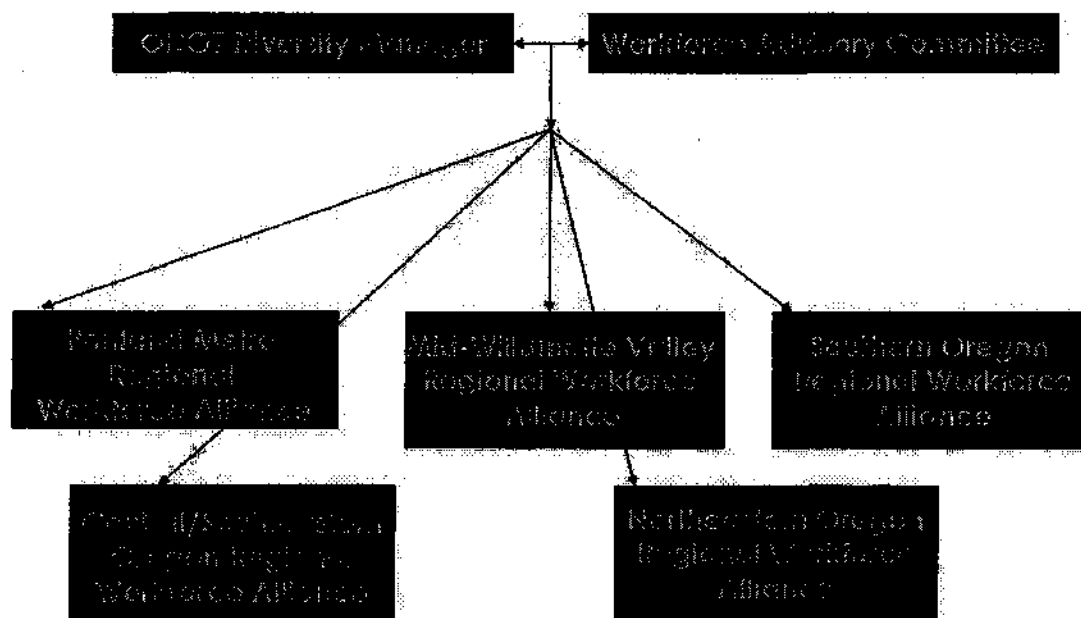
Comprehensive Workforce Plan Service Matrix Chart

Management Structure of the Workforce Development Plan July 1, 2005

Management of the Workforce Development Plan requires the leadership and participation of all the plan's partners to build a diverse, skilled workforce. ODOT has appointed an agency manager to oversee the program and to coordinate with the Regional Workforce Alliances and a Workforce Advisory Committee who will assist in implementing the Plan.

The five Regional Workforce Alliances will implement the plan at the regional level. The Workforce Advisory Committee provides guidance and evaluation of the plan for ODOT's Director, and provides a forum for partners to communicate on a regular basis and resolve issues.

Management Structure of the Workforce Development Plan



The Regional Workforce Alliances implement the plan at the regional level. Alliances are responsible for creating a system to produce a skilled labor pool.

Workforce Advisory Committee

The focus of the Workforce Advisory Committee is on providing guidance and evaluation of the Workforce Development Plan for ODOT's Director and setting forth recommendations to address issues as identified. Where resolution is required outside the purview of this committee, recommendations will be forwarded to ODOT for disposition. The committee is also responsible for reporting on plan goals, implementation progress, and tracking performance measures of the plan's partners. Additionally, this committee provides a forum for partners to communicate on a regular basis and resolve issues. This committee is composed of representatives from the Bureau of Labor and Industries, Community Colleges and Workforce Development, the contracting community, Governor's Office, ODOT, Oregon Employment Department, organized labor, private-sector, women and minority individuals and businesses, and other partners. ODOT's Director's Office will chair this committee.

Regional Workforce Alliances

Regional Workforce Alliances will implement the Workforce Development Plan at the regional level. The Alliances are comprised of the Plan's partners in a specific geographic area. The Alliances work under the direction of ODOT's Diversity Manager and are led by an Alliance Manager. Alliance Managers are existing ODOT Office of Civil Rights staff. Each alliance will develop implementation work plans specific to their region. An alliance will cover each of the following five geographic areas: 1) Portland Metro, 2) Mid-Willamette Valley, 3) Southern Oregon, 4) Central/South Eastern Oregon, and 5) Northern Eastern Oregon.

Plans

Within two months of formation, each Alliance will create a region-specific Alliance Plan for providing a qualified, skilled labor force. The Alliance Plan serves as an operations guide and provides benchmarks for future evaluation. A major component of the Alliance Plan is developing strategies to link the need for recruitment and skills development with the organizations and agencies providing these services. The Alliance Plan also identifies the regional partners involved with implementation efforts.

Memorandum of Understanding

The alliances are also responsible for developing a Memorandum of Understanding (MOU) with regional partners. The MOU describes the responsibilities for providing training services and developing training programs specifically for women and minorities. Support services for contractors are also outlined, including obtaining contractor involvement in training efforts and provisions for a single point of contact for contractors to access the labor pool. Other responsibilities outlined in the MOU include maximizing existing funds and resources, staff training, and job placement and follow-up services, including mentoring programs and monitoring of participants. It also provides guidelines for evaluation of the plan.

M E M O R A N D U M

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METRO

DATE: July 7, 2005
TO: JPACT Members and Interested Parties
FROM: Bridget Wieghart, Corridor and Freight Manager
SUBJECT: Corridor Priorities - Discussion

A subgroup of TPAC has been reviewing the status of the corridor refinement planning work program that was adopted as an amendment to the 2000 RTP. At the June 24 TPAC meeting, Metro staff reviewed, and obtained comments on, potential updates to the work program proposed by the TPAC subgroup. These updates reflect work that has been completed in the first planning period and identify priorities for the second planning period.

At the July 14 JPACT meeting, Metro staff will report on work program updates proposed by TPAC. The proposed updates are reflected in bold on the attached work program. As additional background, I have also attached a summary of the findings of the corridor initiative evaluation that was prepared in 2001.

This is an informational item for discussion. After obtaining feedback from JPACT and the Metro Council on the overall approach, a more detailed work program, which will reflect lead agency, funding status and next steps will be developed.

Corridor and Key Facilities Corridor Planning On-Going	First Planning Period (2001 - 2005)	Second Planning Period (2006 - 2010)	Third Planning Period (2011 - 2020)
I-5 (North) Corridor - I-5 from I-84 to Vancouver	I - 5 Trade Corridor Study <i>Completed</i>	Financial Plan/EIS/Preliminary Engineering <i>Study Initiated</i>	
Powell/Foster Corridor - Powell Blvd. from the west end of Ross Island Bridge to Gresham. Foster Road from Powell to Hwy. 212 Damascus.	Corridor Planning - Phase I <i>Study Completed</i>	Phase II Planning, Powell Street design, Environmental Impact Study and Preliminary Engineering of I-205 Interchange	
Highway 217 Corridor - Hwy. 217 from Sunset Hwy. To I-5	Corridor Planning <i>Study Initiated</i>	Environmental Impact Study and Preliminary Engineering	
Sunrise Corridor - Hwy. 212/224 from I-205 to US 26.	Complete Refinement Planning and EIS for Unit 1 <i>Study Initiated</i>	Begin Unit Two Environmental Study	
Macadam/Highway 43 Corridor - Hwy. 43 from Ross Island Bridge to Oregon City.	Transit/Pedestrian/Bike Transportation Demand Management Study/South of the Sellwood Bridge <i>Study Initiated</i>	Environmental Assessment/DEIS and Preliminary Engineering	
I-5 to Highway 99W Connector - Tualatin- Sherwood Road from I-5 to Hwy. 99W. Hwy. 99W from Tualatin-Sherwood Road to Bell Road.	Southern Alignment Study; Complete Exceptions; Right-of-Way Preservation Analysis; Corridor Planning <i>Initiated</i>	Complete Corridor Plan and Environmental Impact Study	
New Major Corridor Refinements Recommended in the Second Period			
Other Corridors			
North Willamette Crossing Corridor - Study new crossing near St. Johns Bridge (Hwy. 30 from NW Newberry Road to BN Railroad Bridge).			Corridor Planning
Highway 213 Corridor - Hwy. 213 from I-205 to Leland Road.	Construct Southbound Turning lane on Highway 213 <i>Study Completed</i>	Implement Funded Recommendations of Highway 213 Design Study	Refine Corridor Planning and Design
Barbur Blvd./I-5 Corridor - Hwy. 99W and I-5 from I - 405 to Tigard.	Implement Transit Service Improvements and Elements of the Barbur Streetscape Plan (not all streetscape) <i>Study Initiated</i>		Initiate Corridor Planning. Begin Environmental Assessment/Environmental Impact Statement Process
TV Highway Corridor - Tualatin Valley Hwy. from Hwy. 217 to downtown Hillsboro.		Refine scope of work in RTP update.	Corridor Planning (if required)
Sunset Highway Corridor - US 26 from I-405 to 185th Avenue.	Refinement and Environmental Assessment of Hwy. 26 Widening to Cornell. Barnes Road design/construction. <i>Design Complete/Construction started</i>	Engineering of US 26 Widening west of Murray Boulevard	
NE Portland Highway Corridor - Columbia Blvd. from Burgard to Killingsworth, Lombard from I - 5 to Killingsworth, and Killingsworth from Lombard to I - 205.	East End Connector Environmental Assessment; Begin Refinement Planning through I-5 Trade Corridor; Adopt St. Johns Truck Access Study <i>Study Completed</i>	Implement St Johns Truck Access Study Recommendations; Environmental Assessment and Engineering on I-5 Trade Corridor Recommendations <i>Construction Commenced</i>	
I-205 (North) Corridor - I - 205 from Hwy. 224 to Vancouver.	South Transit Corridor Study and I-5 Trade Corridor Study (transit only) <i>Completed</i>	Reconnaissance Planning <i>Initiated</i>	Corridor Planning for Roadway Widening
Banfield (I-84) Corridor - I - 84 from I - 5 to Troutdale.	Light Rail Capacity Analysis <i>Completed</i>	Transit, Transportation System Management Corridor Plan	Transit Improvements and/or Transportation System management Projects
McLoughlin and Hwy. 224 Corridor - Hwy. 99E from Hawthorne Blvd to Oregon City. Hwy. 224 from McLoughlin Blvd. To I - 205.	South Transit Corridor EIS and Preliminary Engineering <i>Initiated</i>		Corridor Planning for Highway Improvements

Technical Evaluation Summary

Jurisdictional Interest

Corridors Proposed for Study

Purpose

In coordination with jurisdictional community members, the technical evaluation will help prioritize corridor planning studies described in the transportation plan. The evaluation will help identify corridors that need improvement.

Geographic Description

Supporting Land Use

Measures of land use density and growth are used in the 2040 plan to identify corridors that need improvement.

Completion

Measures of completion and construction are used in the 2040 plan to identify corridors that need improvement.

Supporting Transit Grid

Assessment of transit needs and dependencies in each corridor.

Supporting Freight Corridor

Measures of freight corridor and freight movement.

Security and Reliability

Identified corridors improve security and reliability of the corridor.

Key Data

First Tier Corridors

I-5 (North) Corridor

Banfield (I-84) Corridor

Powell/Foster Corridor

Sunset Highway Corridor

McLoughlin and Hwy 224 Corridor

Barbur Blvd./I-5 Corridor

Second Tier Corridor

I-205 (South) Corridor

I-5 (South) Corridor

I-205 (North) Corridor

Highway 217 Corridor

Macadam/Highway 43 Corridor

TV Highway Corridor

Sunrise Corridor

Third Tier Corridor

NE Portland Highway Corridor

Highway 213 Corridor

I-5 to Hwy 99W Connection Corridor

North Willamette Crossing Corridor

I-84 to US 26 Corridor

	Land Use	Congestion	Transit	Freight	Reliability
I-5 (North) Corridor	■	■	■	■	■
Banfield (I-84) Corridor	■	■	■	■	■
Powell/Foster Corridor	■	■	■	■	■
Sunset Highway Corridor	■	■	■	■	■
McLoughlin and Hwy 224 Corridor	■	■	■	■	■
Barbur Blvd./I-5 Corridor	■	■	■	■	■
I-205 (South) Corridor	■	■	■	■	■
I-5 (South) Corridor	■	■	■	■	■
I-205 (North) Corridor	■	■	■	■	■
Highway 217 Corridor	■	■	■	■	■
Macadam/Highway 43 Corridor	■	■	■	■	■
TV Highway Corridor	■	■	■	■	■
Sunrise Corridor	■	■	■	■	■
NE Portland Highway Corridor	■	■	■	■	■
Highway 213 Corridor	■	■	■	■	■
I-5 to Hwy 99W Connection Corridor	■	■	■	■	■
North Willamette Crossing Corridor	■	■	■	■	■
I-84 to US 26 Corridor	■	■	■	■	■



METRO

June 10, 2005

Mr. Douglas B. MacDonald, Secretary
Washington State Department of Transportation
Transportation Building
Washington State Department of Transportation
310 Maple Park Avenue SE
PO Box 47300
Olympia WA 98504-7300

RE: HOV Lane on Interstate 5 between 99th Street and Mill Plain

Dear Secretary MacDonald

As you know, the Washington State Department of Transportation instituted a High Occupancy Vehicle lane as a pilot project on Interstate 5 in Vancouver Washington. As you also may be aware, the Oregon Department of Transportation has been working to address the transportation issues on Interstate 5 in the Delta Park to Lombard segment just a short distance south of Mill Plain in Portland.

Recognizing that Interstate 5 is a key transportation corridor for each state and vital to the economic interests of both the greater Portland and Vancouver, Washington communities, we have a deep interest in the pending decisions on both of these projects. Accordingly, the Bi-State Coordination Committee, comprised of elected officials from both sides of the Columbia River and representing local governments in the Portland-Vancouver area, as well as representatives of the ports and the respective departments of transportation from each state, reviewed these pending decisions and the underlying data and made recommendations to the metropolitan planning organizations.

The Joint Policy Advisory Committee on Transportation reviewed these recommendations and also took under advisement the recommendations of the Regional Transportation Council of Southwest Washington. After careful consideration and discussion, the Joint Policy Advisory Committee request that the Washington State Department of Transportation continue to work collaboratively with the State of Oregon on the functioning of the entire I-5 corridor, from 134th Street in Vancouver Washington to the Fremont Bridge in Oregon, including the potential of a managed lane, especially in

Mr. Douglas B. MacDonald

June 10, 2005

Page 2

light of upcoming decisions related to the Columbia River Crossing. The Metro Council has also concurred with this recommendation.

We believe that given the upcoming decisions related to the Columbia River Crossing, close coordination and collaboration on a wide range of issues is vital to our economy and community livability.

Thank you for your consideration of this matter.

Sincerely,

A handwritten signature in black ink, appearing to read 'RB III L'.

Rex Burkholder, Chair
Joint Policy Advisory Committee on Transportation

cc: JPACT members

Bruce Warner, Director, Oregon Department of Transportation

Don Wagner, Southwest Administrator, Washington State Department of Transportation

Matt Garrett, Manager, Region 1, Oregon Department of Transportation



METRO

June 10, 2005...

Mr. Stuart Foster, Chairman
Oregon Transportation Commission
c/o Oregon Department of Transportation

and

Mr. Bruce Warner, Director
Oregon Department of Transportation
Transportation Building room 135
355 Capitol Street NE
Salem, Oregon 97301

RE: Interstate 5 Delta Park to Lombard Project

Dear Chairman Foster and Director Warner

As you know, the Oregon Department of Transportation has been working earnestly to address the transportation issues on Interstate 5 in the Delta Park to Lombard segment. You may also be aware that the Washington State Department of Transportation instituted a High Occupancy Vehicle lane as a pilot project on Interstate 5 in Vancouver Washington just a short distance north of Delta Park.

Recognizing that Interstate 5 is a key transportation corridor for each state and vital to the economic interests of both the greater Portland and Vancouver, Washington communities, we have a deep interest in the pending decisions on both of these projects. Accordingly, the Bi-State Coordination Committee, comprised of elected officials from both sides of the Columbia River and representing local governments in the Portland-Vancouver area, as well as representatives of the ports and the respective departments of transportation from each state, reviewed these pending decisions and the underlying data and made recommendations to the metropolitan planning organizations.

The Joint Policy Advisory Committee on Transportation reviewed these recommendations and took under advisement the recommendations of the Regional Transportation Council of Southwest Washington. After careful consideration and

Chair Foster and Director Warner
June 10, 2005
Page 2

discussion, the Joint Policy Advisory Committee urges that as part of the ongoing Environmental Assessment process for this project, an HOV lane in Oregon continue to be included as an alternative for further analysis of the Interstate 5/Delta Park to Lombard project and that the prospects and priorities for operating the lane as a managed lane be collaboratively examined with the State of Washington. The Metro Council has also concurred with this recommendation.

We believe that given the upcoming decisions related to the Columbia River Crossing, close coordination and collaboration on a wide range of issues is vital to our economy and community livability.

Thank you for your consideration of this matter.

Sincerely,

A handwritten signature in black ink, appearing to read 'Rex Burkholder', with a stylized 'L' at the end.

Rex Burkholder, Chair
Joint Policy Advisory Committee on Transportation

cc: JPACT members

Douglas B MacDonald, Secretary, Washington State Department of Transportation
Don Wagner, Southwest Administrator, Washington State Department of Transportation
Matt Garrett, Manager, Region 1, Oregon Department of Transportation

Speech

Thank you for the opportunity to address this committee this morning. I am Jim Bernard and I have had the honor of serving Milwaukie as its Mayor for over 4 ½ years. I need to start off with a little history for those of you who do not know.

I want you to know that I understand the limitation of all I am about to say both politically and economically. I have come here to address you today to make sure you understand Council's concerns.

Prior to my term most of our City Council was recalled for supporting light rail into Milwaukie a plan they felt would destroy the community. City Council was not listening. Support for Council has changed and the City of Milwaukie has gone through a huge process to plan its downtown and in fact to bring light rail back into the community. We have spent hundreds of thousands of dollars planning and fine-tuning that plan. Many of you on this committee may have been here voting to support phase 1 and 2, phase 1 being 205 light rail and in that same phase a park and ride facility at what we call Southgate.

We have been fine tuning that decision ever since and it has not always been pleasant. Many of those who supported the recall of City Council now support the current proposal. Opposition is very limited and consists of just a handful. In our 7 neighborhoods all but one support the proposal.

37 million is being invested in our downtown and the McLoughlin corridor in public and private investment. Some of those dollars are Metro dollars. Another 20 million of investment is taking place outside of our downtown core area. If you have been reading the paper this month you will know that we removed our last 2 buildings on the riverfront. Some phase of all our projects have started and we need to get a few things going.

Southgate Park & ride needs to come to our planning commission as soon as possible. Remember it was promised to us in Phase 1 of South corridor. We are eliminating hundreds of parking spaces in our downtown due to construction. TriMet's transit center is taking up 2 blocks of our downtown and parking and as you can imagine is a premium. We have stuck our political necks out because we believe promises were made.

Now we have an even bigger threat at a location that was always a planned transit center even way back in the first failed attempt to build light rail. This

location is at the corner of Tacoma and McLoughlin. This is the site of the proposed Wal-Mart, located just North of our cities border. The property owner has heard for years that this was to become a park & ride and he tells me he is tired of waiting. So he has invested in removal of the old structure and has a proposal to build a Wal-Mart. City Council with unanimous support sent a letter to Mayor Tom Potter in opposition to the construction of a Wal-Mart at this location, for various reasons. I believe if this structure is build three things will happen. There will be no light rail station at this location, Sellwood/West and East Moreland neighborhood will loose their light rail station and this structure will block future light rail to Milwaukie. The fact that it is a Wal-Mart will ruin our chances of bringing a niche grocery store into our downtown and severely limit potential redevelopment. I believe downtowns are the life's blood of communities. Because this development is outside our borders and in Portland we will have little say over this proposal.

What I am asking you to do today is to get the South Corridor committee back up and running. I want to hear from the Portland City Council and from the Citizens of the Sellwood/Moreland area that they support this location for a light rail station and someone need to step up and purchase this property so this development is stopped. I also want some promises fulfilled on our downtown transit center and the Southgate Park & ride. We need to find parking to replace the permanent and temporally elimination of parking due to construction, as soon as possible. So please help us get this process moving again.

Thank you.

Jim Browne
Mayor of Milwaukie

M E M O R A N D U M

600 NORTHEAST GRAND AVENUE | PORTLAND, OREGON 97232 2736
TEL 503 797 1916 | FAX 503 797 1930



DATE: July 7, 2005

TO: JPACT Members

FROM: Rex Burkholder, JPACT Chair

SUBJECT: Attendance Confirmation at Thursday, August 11th JPACT meeting

*Verbal Conversation
w/ John Rist*

At the **Thursday, August 11, 2005 JPACT meeting**, the 2006-2009 final MTIP and air quality conformity determination will be up for adoption. As such, a quorum is essential.

Please confirm your attendance at the August 11th meeting below:

NAME:

Kenner, Bill



I will be in attendance



My alternate will be in attendance



Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

M E M O R A N D U M

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Please confirm your attendance at the August 11th meeting below:

NAME: _____

- ☐ I will be in attendance
- ☐ My alternate will be in attendance
- ☐ Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

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Please confirm your attendance at the August 11th meeting below:

NAME: Rob Drake

☒ I will be in attendance

☐ My alternate will be in attendance

☐ Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

M E M O R A N D U M

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DATE: July 7, 2005
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At the **Thursday, August 11, 2005 JPACT meeting**, the 2006-2009 final MTIP and air quality conformity determination will be up for adoption. As such, a quorum is essential.

Please confirm your attendance at the August 11th meeting below:

NAME: MATTHEW GANES

☒ I will be in attendance

☐ My alternate will be in attendance

☐ Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

M E M O R A N D U M

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METRO

Verbal Confirmation

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Please confirm your attendance at the August 11th meeting below:

NAME:

Paul Thalhofer

- ☒ I will be in attendance
☐ My alternate will be in attendance
☐ Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

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Please confirm your attendance at the August 11th meeting below:

NAME: Fred Hansch

- ☒ I will be in attendance
☐ My alternate will be in attendance
☐ Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

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Please confirm your attendance at the August 11th meeting below:

NAME: Jane Lahsene (alternate)

- ☒ I will be in attendance
☒ My alternate will be in attendance
☐ Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

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Please confirm your attendance at the August 11th meeting below:

NAME: Lynn Peterson

☒ I will be in attendance

☐ My alternate will be in attendance

☐ Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates

M E M O R A N D U M

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Please confirm your attendance at the August 11th meeting below:

NAME:

Dick PEDERSEN



I will be in attendance



My alternate will be in attendance



Neither my alternate nor myself will be available

Please complete form and return on July 14th at the JPACT meeting.

Thank you.

cc: JPACT Alternates



METRO

**JOINT POLICY ADVISORY COMMITTEE ON TRANSPORTATION
SIGN - IN SHEET**

July 14, 2005

NAME	JURISDICTION	INITIALS
Chair Rex Burkholder	Metro Council	
Vice Chair Rod Park	Metro Council	
Councilor Brian Newman	Metro Council	
Commissioner Sam Adams	City of Portland	
<i>Mayor Tom Potter</i>	<i>City of Portland</i>	
Mayor Rob Drake	City of Beaverton, representing Cities of Washington Co.	
<i>Mayor Lou Ogden</i>	<i>City of Tualatin, representing Cities of Washington Co.</i>	
Mr. Matthew Garrett	ODOT - Region 1	
<i>Ms. Elaine Smith</i>	<i>ODOT - Region 1</i>	
Mr. Dick Pedersen	Oregon Dept. of Environmental Quality (DEQ)	
<i>Ms. Annette Liebe</i>	<i>Oregon Dept. of Environmental Quality (DEQ)</i>	
<i>Mr. Andy Ginsburg</i>	<i>Oregon Dept. of Environmental Quality (DEQ)</i>	
Mr. Fred Hansen	TriMet	
<i>Mr. Neil McFarlane</i>	<i>TriMet</i>	
Commissioner Bill Kennemer	Clackamas County	
<i>Commissioner Martha Schrader</i>	<i>Clackamas County</i>	MS
Mayor Paul Thalhofer	City of Troutdale, representing Cities of Multnomah Co.	
<i>Mayor Charles Becker</i>	<i>City of Gresham, representing Cities of Multnomah Co.</i>	
Councilor Lynn Peterson	City of Lake Oswego, representing Cities of Clackamas Co.	
<i>Mayor James Bernard</i>	<i>City of Milwaukie, representing Cities of Clackamas Co.</i>	
Mayor Royce Pollard	City of Vancouver	
<i>Mr. Dean Lookingbill</i>	<i>SW Washington RTC</i>	
Commissioner Roy Rogers	Washington County	
<i>Commissioner Tom Brian</i>	<i>Washington County</i>	
Commissioner Maria Rojo de Steffey	Multnomah County	
<i>Commissioner Lonnie Roberts</i>	<i>Multnomah County</i>	
Commissioner Steve Stuart	Clark County	
<i>Mr. Peter Capell</i>	<i>Clark County</i>	
Mr. Don Wagner	Washington State Dept. of Transportation (WSDOT)	
<i>Mr. Doug Ficco</i>	<i>Washington State Dept. of Transportation (WSDOT)</i>	
Mr. Bill Wyatt	Port of Portland	
<i>Ms. Susie Lahsene</i>	<i>Port of Portland</i>	
<i>Commissioner Jay Waldron</i>	<i>Port of Portland</i>	



METRO

**POLICY ADVISORY COMMITTEE ON TRANSPORTATION
SIGN - IN SHEET** - Recorder's Copy

July 14, 2005

NAME	JURISDICTION	INITIALS
✓ Chair Rex Burkholder	Metro Council	
✓ Vice Chair Rod Park	Metro Council	
✓ Councilor Brian Newman	Metro Council	
Commissioner Sam Adams	City of Portland	
Mayor Tom Potter	City of Portland	
✓ Mayor Rob Drake	City of Beaverton, representing Cities of Washington Co.	
Mayor Lou Ogden	City of Tualatin, representing Cities of Washington Co.	
✓ Mr. Matthew Garrett	ODOT - Region 1	
Ms. Elaine Smith	ODOT - Region 1	
✓ Mr. Dick Pedersen	Oregon Dept. of Environmental Quality (DEQ)	
Ms. Annette Liebe	Oregon Dept. of Environmental Quality (DEQ)	
Mr. Andy Ginsburg	Oregon Dept. of Environmental Quality (DEQ)	
✓ Mr. Fred Hansen	TriMet	
Mr. Neil McFarlane	TriMet	
Commissioner Bill Kennemer	Clackamas County	
✓ Commissioner Martha Schrader	Clackamas County	
✓ Mayor Paul Thalhoffer	City of Troutdale, representing Cities of Multnomah Co.	
Mayor Charles Becker	City of Gresham, representing Cities of Multnomah Co.	
✓ Councilor Lynn Peterson	City of Lake Oswego, representing Cities of Clackamas Co.	
Mayor James Bernard	City of Milwaukie, representing Cities of Clackamas Co.	
✗ Mayor Royce Pollard	City of Vancouver	
Mr. Dean Lookingbill	SW Washington RTC	
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✗ Mr. Don Wagner	Washington State Dept. of Transportation (WSDOT)	
Mr. Doug Ficco	Washington State Dept. of Transportation (WSDOT)	
Mr. Bill Wyatt	Port of Portland	
Ms. Susie Lahsene	Port of Portland	
Commissioner Jay Waldron	Port of Portland	

Tom Blunk of Scott Bricker

[Roland Chapowski]

Staff: Ted Leybold, Andy C., Robin Mett,
Tom K., Randy Tucker

→ Sharon Namet, Ron Swares,
Guests: Karen Schellig, Phil Selinger, John Rist
on record Dave Nordberg, Laurel Wentworth

Text
TPAC / MTAC - W. July 27th
TPAC July 29, Sept 2nd
JPACT Aug. 11



Metro sign-in sheet

Please be aware that all information submitted here will become public record, per state law, and will be made available to those who request it.

METRO
PEOPLE PLACES
OPEN SPACES

Event JPACT Location Metro Regional Center – Council Chambers

Date July 14, 2005 Time 7:30 a.m.

NAME	AFFILIATION
Dave Nordberg	DEQ
Karen Schilling	Multnomah County
Sed Feybold	Metro
Ron Swaren	Sellwood-Moreland
Kris Strickler	CRC
John Wiebke	City of Hillsboro
Mark Garrity	PB <small>garrity@pbworld.com (please add to contact list)</small>
John Rist	Clackamas County
Randy Tucker	Metro
Jay Lyman	David Ems and Associates
Dawn Kane	Metro
Kathleen M Schulte	Metro
Amelia Portafeld	Metro
Rob McLaughlin	CRC
Jeff Dalling	City of Cornelius
Tom McGRAT	CRC
Ron Papsdorf	City of Gresham
Nancy Kraushaar	City of Oregon City
Sharon Nassut	ETA